Intérêt que suscite chez les touristes les manifestations et les activités autochtones

Intérêt que suscite chez les touristes les manifestations et les activités autochtones

- Contexte -

Des ministères et des organismes de tourisme du Canada se sont associés pour effectuer deux importantes études d'évaluation des activités et des éléments de motivation en matière de voyages d'agrément chez les Canadiens et les Américains.

Cette enquête, intitulée Enquête sur les activités et les préférences en matière de voyage (EAPMV), représente une évaluation approfondie des comportements et des éléments de motivation en matière de voyages et fournit une base de données riche et sérieuse pour élaborer des stratégies de commercialisation et créer des produits de voyage visant à attirer des touristes au Canada et en Ontario.

La série d'analyses actuellement en cours s'appuie sur la base de données de l'EAPMV pour examiner les tendances du marché et les facteurs qui motivent le comportement en matière de voyages. L'EAPMV, qui comprenait une enquête par téléphone et une enquête par courrier-réponse à laquelle les répondants devaient répondre, a été menée au Canada et aux États-Unis du 27 septembre 1999 au 16 avril 2000. L'enquête par téléphone a été menée auprès de 28 397 personnes aux États-Unis et de 18 385 personnes au Canada. Les répondants ont été choisis au hasard dans des ménages. On a demandé aux participants à l'enquête par téléphone qui avaient voyagé au cours des deux années précédentes ou qui souhaitaient faire un voyage au cours des deux prochaines années de remplir un questionnaire par courrier-réponse. En tout, 40 271 personnes se sont qualifiées pour le questionnaire par courrier-réponse. Sur ce nombre, 11 892 personnes (29,4 %) ont renvoyé le questionnaire dûment rempli. Le taux de réponse au questionnaire a été plus élevé au Canada, soit 5 490 personnes (35,2 %), qu'aux États-Unis, soit 6 405 personnes (26,0 %).

L'étude actuelle porte sur l'intérêt que suscitent les manifestations et les attractions autochtones chez les répondants en voyage (p.ex. assister à des activités culturelles autochtones dans un endroit reculé ou rural, assister à un pow-wow ou à toute autre célébration autochtone, comme le powwow de Wikwemikong. La base de données a servi à cerner les segments de marché qui ont assisté ou exprimé le souhait d'assister à ce genre de manifestations ou d'attractions. Ce rapport fournit un profil démographique, les activités des Canadiens en matière de voyages, les intentions de voyage des Canadiens, les expériences de vacances recherchées au cours des deux années précédentes, les activités de vacances auxquelles les répondants ont participé au cours des deux années, les habitudes de consommation de médias, les sources d'information consultées pour planifier de brèves ou de longues vacances ainsi que les impressions à propos du Canada et de l'Ontario en ce qui a trait à l'intérêt porté aux activités touristiques autochtones. Ce rapport illustre également le marché éventuel global et cerne les secteurs offrant les plus grandes possibilités quant à la commercialisation, à la publicité et à la promotion de produits de vacances visant le tourisme autochtone au Canada et en Ontario.

Intérêt que suscite chez les touristes les manifestations et les activités autochtones

- Principales conclusions -

Parmi tous les touristes (au moins 18 ans), l'incidence de participation ou de l'intérêt porté à des activités axées sur les autochtones était nettement supérieur aux États-Unis qu'au Canada. Dans l'ensemble, 26,2 % du marché américain a participé pendant les vacances à des activités de ce genre ou a exprimé un intérêt à leur égard, tandis que 15,3 % seulement du marché canadien s'y intéressait.

Au Canada et aux États-Unis, les célibataires âgés, les célibataires et les couples d'âge mûr à revenu moyen étaient les plus susceptibles de s'intéresser à des manifestations et à des activités touristiques autochtones. Contrairement à ceux du Canada, les couples américains d'âge mûr à revenu moyen portaient un intérêt supérieur à la moyenne aux attractions autochtones. De toute évidence, l'âge constitue un facteur important dans le tourisme axé sur les autochtones, les segments du marché d'âge mûr s'y intéressant beaucoup plus. De plus, au cours des deux dernières années, plus le niveau d'éducation des répondants était élevé, plus la participation à des activités autochtones pendant les vacances avait tendance à augmenter. Dans l'ensemble, les touristes d'âge mûr et détenant une solide éducation représentent le marché cible en ce qui concerne les activités et attractions touristiques autochtones.

Les personnes en voyage qui ont participé à des activités touristiques axées sur les autochtones au cours des deux dernières années étaient plus susceptibles de rechercher pendant leurs vacances des loisirs d'exploration (p.ex. visites de lieux historiques, de merveilles de la nature) et des activités éducatives (p.ex. expériences éducatives tactiles). Il faudrait que les annonces et le matériel publicitaires visant à encourager le tourisme axé sur les autochtones mettent l'accent sur la beauté de la nature ainsi que sur les possibilités culturelles et éducatives de la destination.

Au cours des deux dernières années, les personnes en voyage qui ont participé à des activités touristiques axées sur les autochtones et, dans une certaine mesure, celles qui s'y intéressaient, étaient également plus susceptibles de s'adonner à des activités dans la nature (p.ex. observation de la flore et des oiseaux, pique-niques dans des parcs) et de visiter un musée, ce qui indique que les personnes qui s'intéressent aux attractions touristiques autochtones ont tendance à aimer les lieux historiques et naturels. En alliant ce genre d'activités à des attractions autochtones, on créerait des voyages tout compris qui attireraient ce marché.

Les personnes qui ont participé à une activité touristique axée sur les autochtones étaient aussi plus susceptibles d'avoir séjourné dans un terrain de camping ou dans la nature, dans un gîte au bord d'un lac ou en pleine nature ou encore dans un gite reculé et accessible seulement en avion, résultats qui témoignent de l'intérêt que ces touristes portent aux activités de plein air.

Les personnes qui s'intéressaient à des activités touristiques axées sur les autochtones étaient plus susceptibles de consulter un grand nombre de sources de renseignements lors de la planification de leur voyage, en particulier des articles de journaux et de magazines, des bureaux d'information touristique et des guides de voyage (p.ex. Fodor). La presse écrite semble le meilleur moyen de promouvoir sur le marché les attractions touristiques axées sur les autochtones.

Travel Activities & Motivation Survey

Aboriginal Tourism Report

TAMS
Travel Activities &
Motivation Survey

September, 2001

Lang
RESEARCH

Travel Activities & Motivation Survey

104-00671/

Prepared by:

Lang Research Inc.

on behalf of

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Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade & Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food & Rural Affairs

Ontario Tourism, Culture & Recreation

Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

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Motivation Survey

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Interest In Aboriginal Tourism Vacation Activities

- Key Findings -

The incidence of the total population (18 plus) that participated in an aboriginal-related tourism activity, or exhibited an interest in aboriginal tourism attractions, was substantially higher in the United States than in Canada. Overall, 26.2 % of the U.S. market participated in or expressed an interest in vacation activities of this nature, while only 15.3 % of the Canadian market exhibited such an interest.

In both Canada and the U.S., Senior Singles, Mainstream Mature Singles and Mainstream Mature Couples were the most likely to be interested in aboriginal tourism activities and attractions. Unlike Canada, Mainstream Senior Couples in the United States also exhibited an above average interest in aboriginal attractions. Clearly, age is an important factor in aboriginal tourism, with more mature sectors of the market exhibiting greater interest in such activities. As well, participation in aboriginal vacation activities during the past two years tended to increase as the education level of the respondent increased. Overall, mature, well-educated travellers represent the prime target market for aboriginal tourism activities and attractions.

Those who participated in an aboriginal tourism activity while travelling during the past two years were more likely to have sought out vacation experiences associated with exploration (e.g., visiting historical sites, natural wonders) and learning (e.g., to have a hands-on learning experience). Advertising and promotional materials designed to promote aboriginal tourism should emphasize the natural, cultural and learning-related opportunities offered by the destination.

Those who participated in an aboriginal tourism activity, and to a certain extent, those who expressed an interest in such attractions, were also more likely to have engaged in natural sightseeing activities while on a trip during the past two years (e.g., wildflower and flora viewing, birdwatching, and going on picnics in park settings). They were also more likely to have visited a museum. This indicates that those with an interest in aboriginal tourist attractions tend to enjoy historical and natural sites. Combining such activities with aboriginal attractions will create attractive travel packages for this market.

Those who participated in an aboriginal tourism activity were also more likely to have camped in a public campground or in the wilderness, to have stayed at a lakeside or wilderness lodge, or a remote fly-in lodge. This again reflects the interest of these travellers in opportunities to experience the outdoors.

Those interested in aboriginal tourism were more likely to consult a larger number of information sources when planning their vacations, especially articles in newspapers and magazines, travel information offices and travel guides (e.g., Fodor's). Print media seems to be the most efficient way to promote aboriginal tourism attractions to the marketplace.

Table of Contents

Key Findings (English)	iii
Conclusions principales (French)	iv
Background	1
Aboriginal Tourism Interest Index: Method	2
Interest in Aboriginal Tourism: Canada vs. U.S.	3
Interest in Aboriginal Tourism: Canada By Province	4
Interest in Aboriginal Tourism: U.S. By Region	5
Interest in Aboriginal Tourism: By Demographics	6
Interest in Aboriginal Tourism: By Market Segment	8
Interest in Aboriginal Tourism: Travel in Canada	10
Intentions to Travel to Canada in Next Two Years	13
General Vacation Experiences Sought	14
Outdoor Activities Sought During Pleasure Travel	15
Cultural and Entertainment Activities Sought	16
Accommodation-Related Activities Sought	17
Day and Overnight Touring Activities Sought	18
Sources of Information Consulted to Plan Vacations	19
Interest in New Tourism Products	21
Media Index for Print Media	23
Media Index for Television Programs	24
Percent Using Internet to Research or Book Trips	25
Destination Image Mapping	26
Overall Market Potential Index By Segment	29
Technical Appendices	

Background

An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators, and provides a rich and authoritative database to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. The TAMS database consisted of a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these, 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire, while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

This current study examines interest in aboriginal events and attractions while travelling (e.g., attending aboriginal cultural experiences in a remote or rural location, attending a powwow or other aboriginal celebration, such as the Wikwemikong powwow). The database was used to identify sectors of the market that attended or expressed an interest in attending such events or attractions. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations, and impressions of Canada and Ontario relative to the interest shown in aboriginal tourism activities. This report also provides an Overall Market Potential of each segment of the market. This identifies the segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada's/Ontario's aboriginal tourism related vacation products.

Aboriginal Tourism Interest Index

Construction of the Index

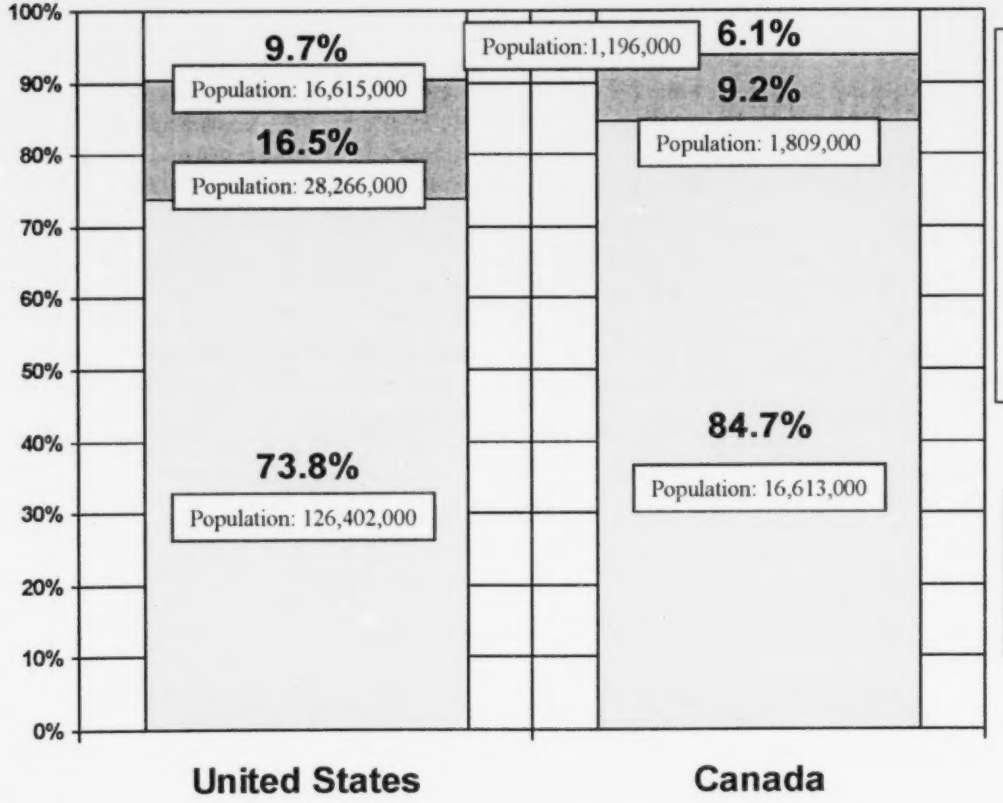
The TAMS Mailback Survey contained three items specifically associated with aboriginal tourism, which were used to construct an overall Aboriginal Tourism Interest Index. These were:

- Having participated in the following cultural and entertainment activities during the past two years:
  - Attending aboriginal cultural experiences in a remote or rural location
  - Attending a powwow or other aboriginal celebration, such as the Wikwemikong powwow
- Indicating that the following new attraction would make them "a lot more interested" in taking a trip to Ontario:
  - An aboriginal or native Canadian attraction like the Indian Museum of North America in Arizona or the Polynesian Cultural Center in Hawaii.

The responses to these three items were combined to construct the overall Aboriginal Tourism Interest Index. Respondents were classified into three groups:

- **No Interest** (Did not participate in either of the two aboriginal cultural activities, and does not express interest in the new aboriginal attraction)
- **Interested** (Expressed interest in the new aboriginal attraction, but did not participate in either of the two aboriginal cultural activities)
- **Participated** (Participated in either one of the two aboriginal cultural activities).

Interest in Aboriginal Tourism
Canada versus United States
Based on Prior Travel Activities and Future Interest
Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

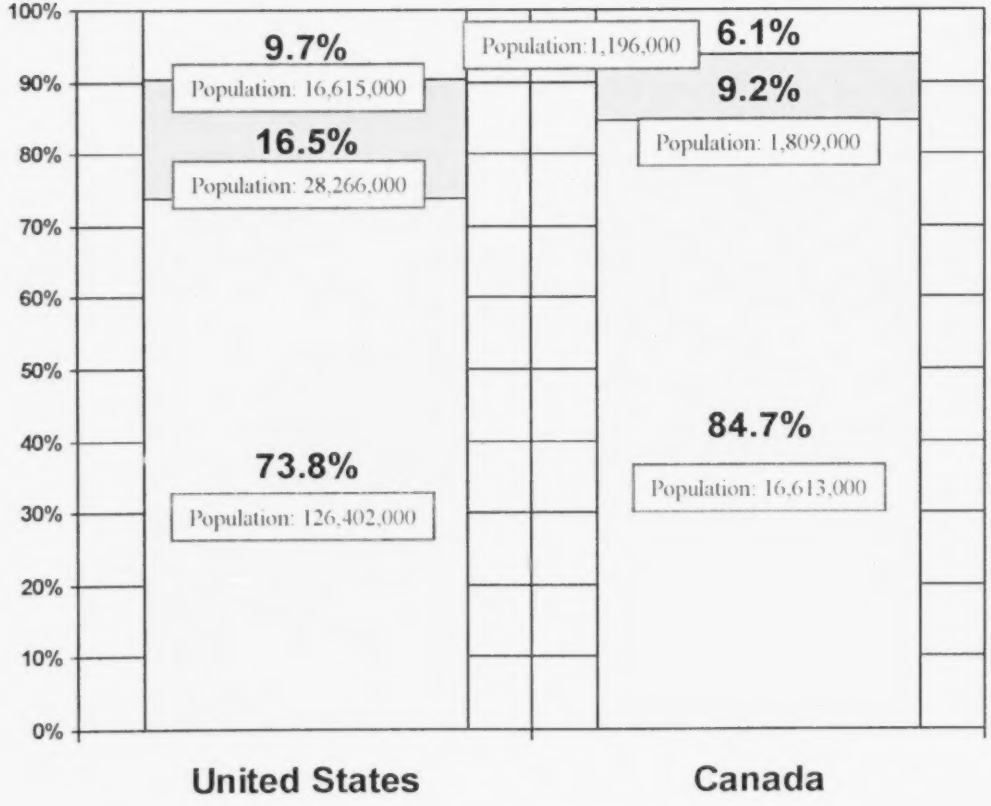


The incidence of the total population (18 plus) that exhibited an interest in aboriginal-related vacation activities was substantially higher in the United States than in Canada. Overall, 26.2 % of the U.S. market exhibited an interest in vacation activities of this nature, while only 15.3 % of the Canadian market exhibited such an interest.

- Participated
- Interested
- No Interest

TAMS
Travel Activities & Motivation Survey

Lang RESEARCH



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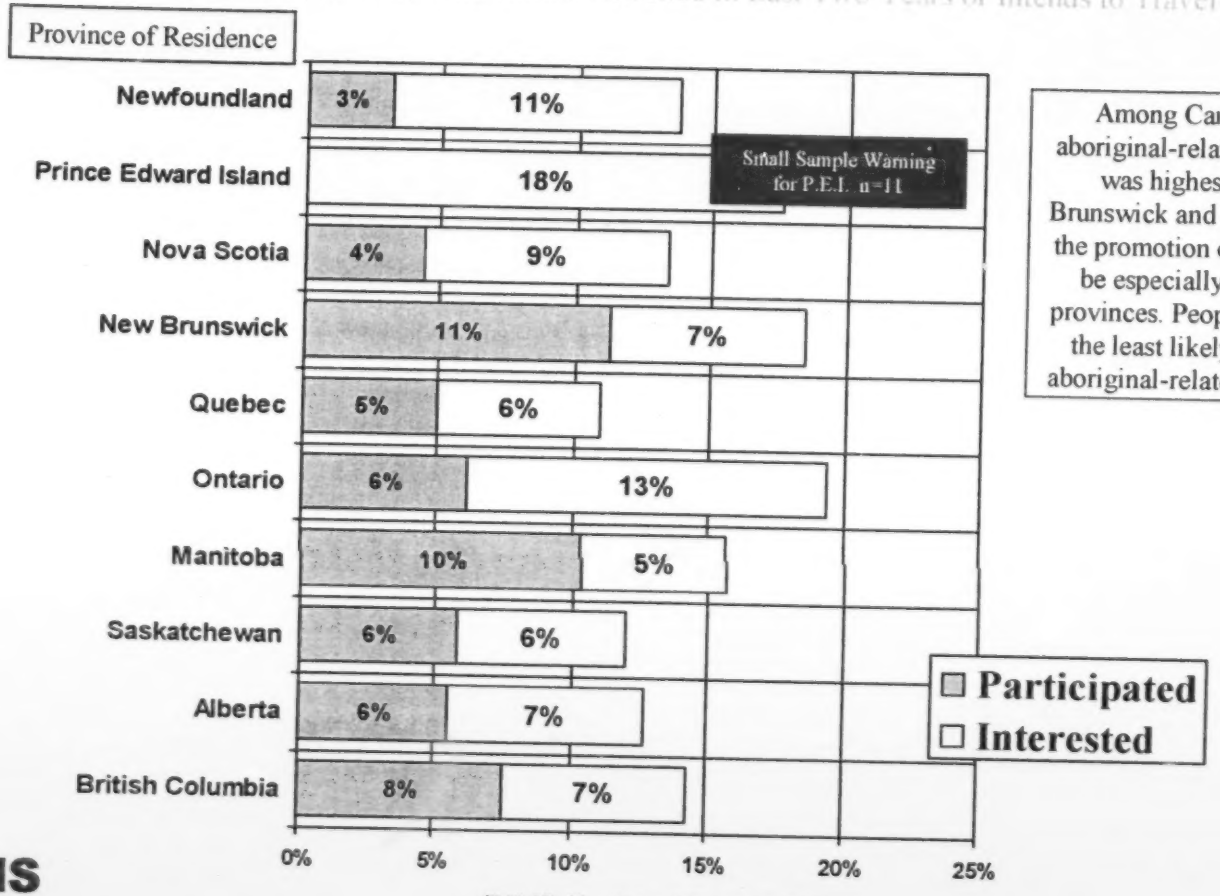
Interest in Aboriginal Tourism: Based on Prior Travel Activities & Future Interest

Canada: By Province

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

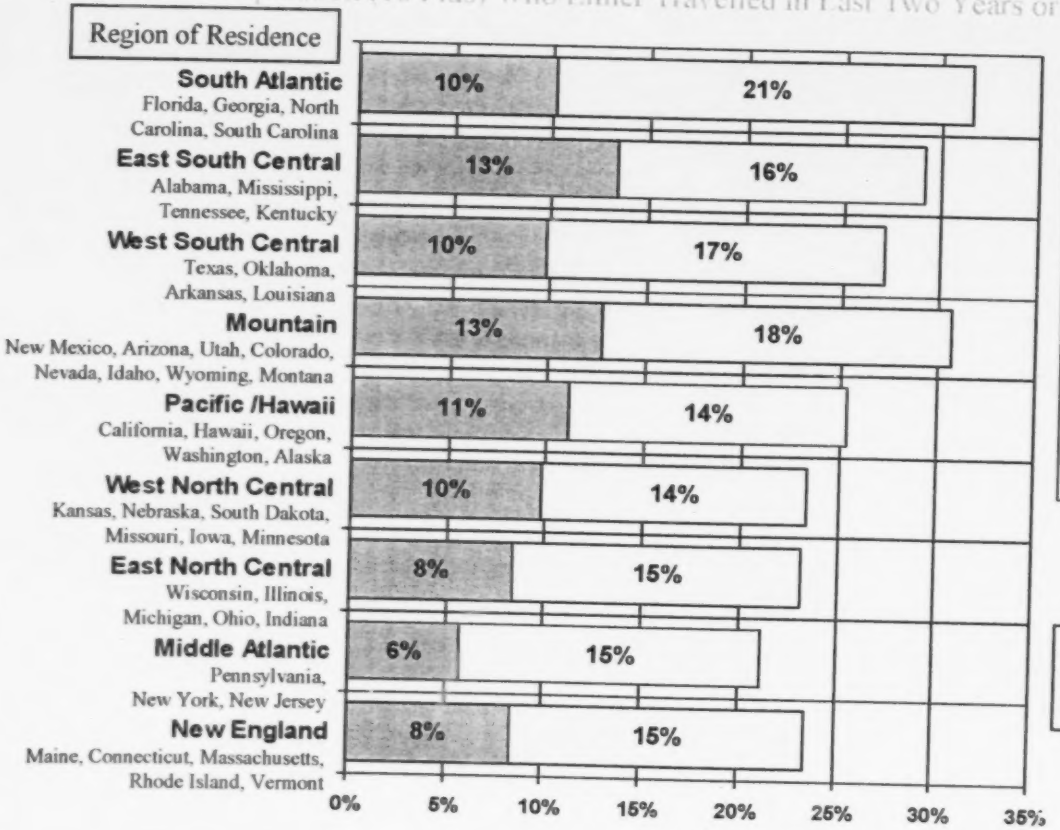


Among Canadians, interest in aboriginal-related vacation activities was highest in Ontario, New Brunswick and P.E.I., suggesting that the promotion of such activities may be especially effective for these provinces. People from Quebec were the least likely to be interested in aboriginal-related vacation activities.

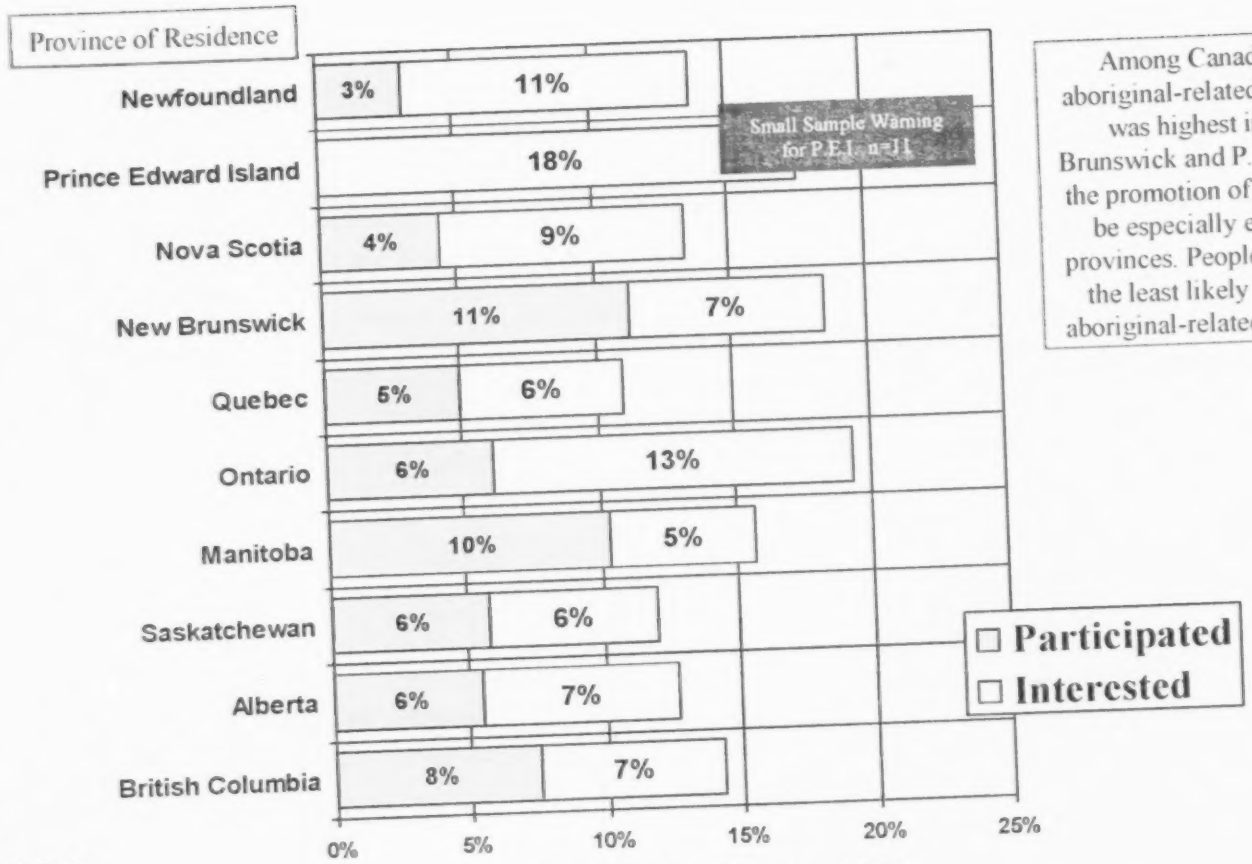
Interest in Aboriginal Tourism: Based on Prior Travel Activities & Future Interest

United States: By Region

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



In the United States, interest in aboriginal-related vacation activities was highest in the South Atlantic and Mountain regions. There was also above average interest in the East South Central and West South Central regions of the U.S. These markets offer greater potential for the promotion of aboriginal tourism related vacation activities. People from the Middle Atlantic region were the least likely to show an interest in these sorts of vacation activities.



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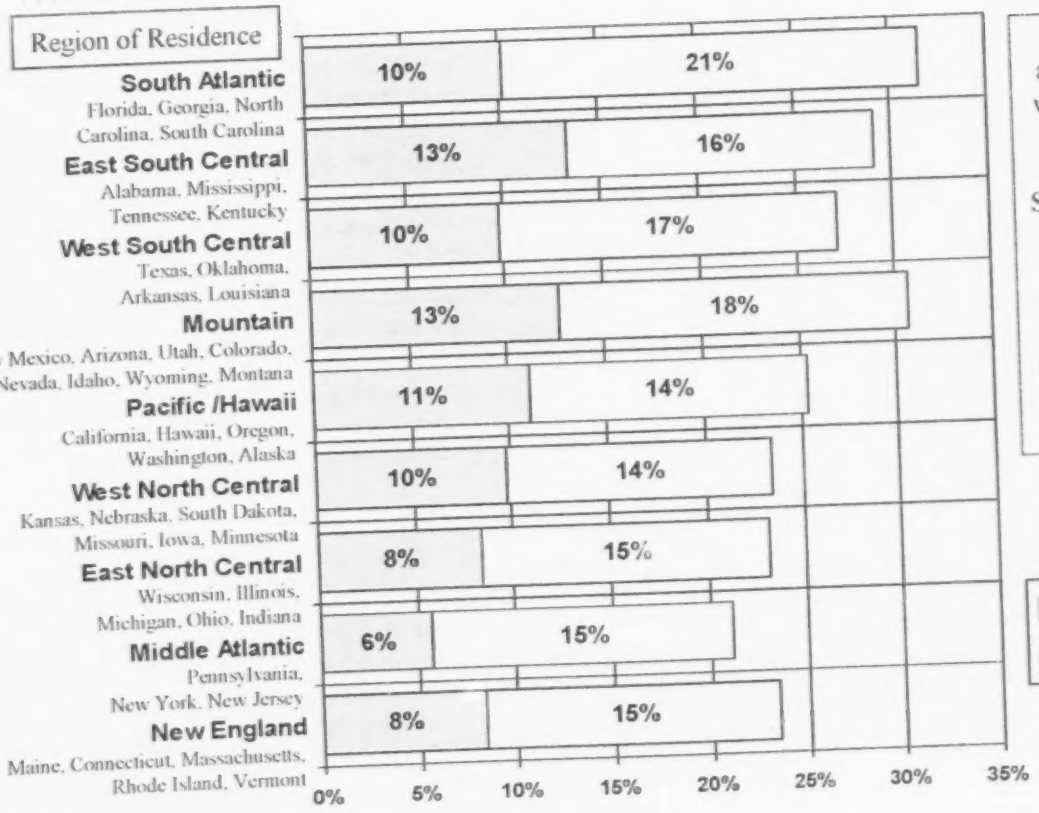

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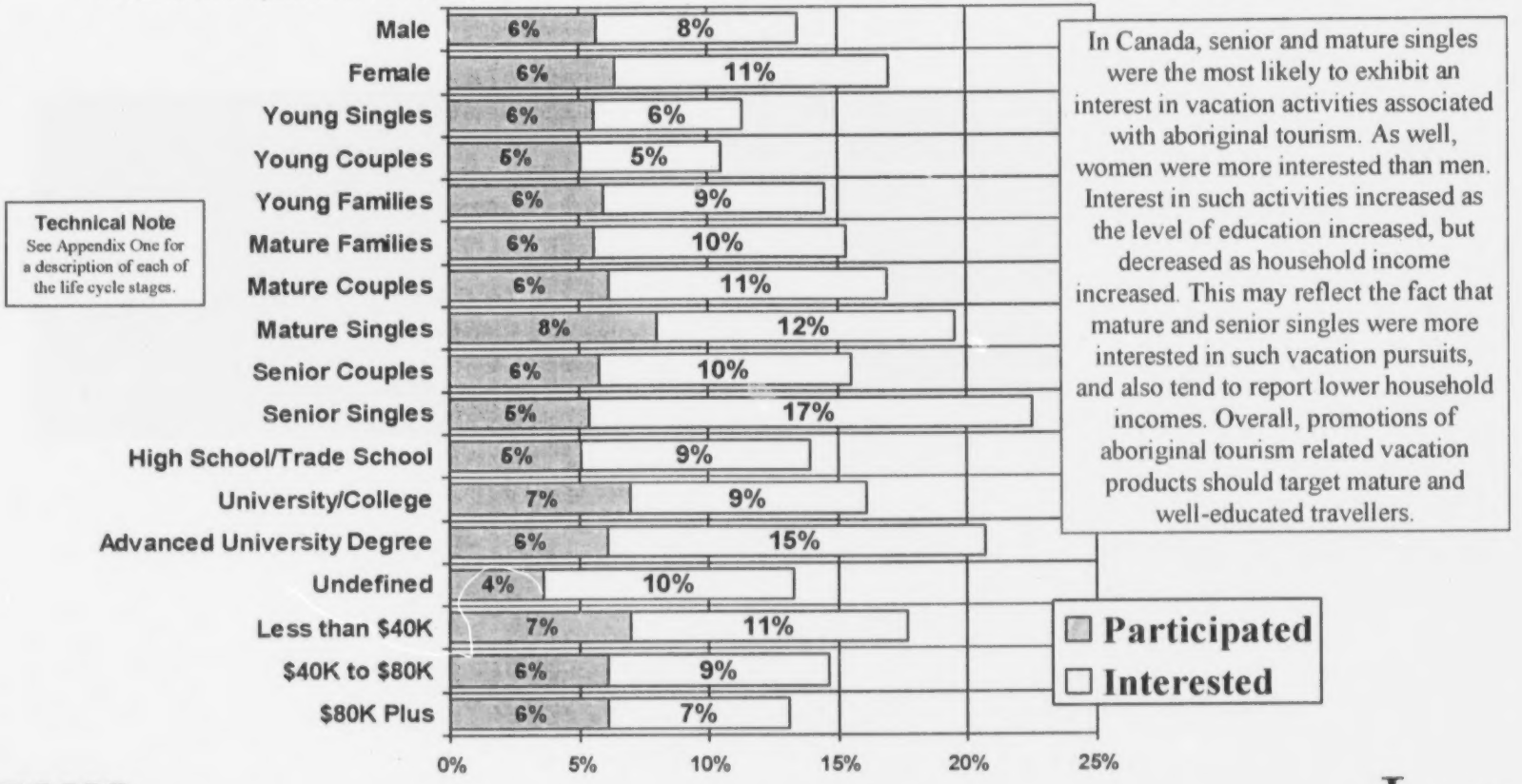
Interest in Aboriginal Tourism

Canada: By Demographics

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



Technical Note
See Appendix One for a description of each of the life cycle stages.

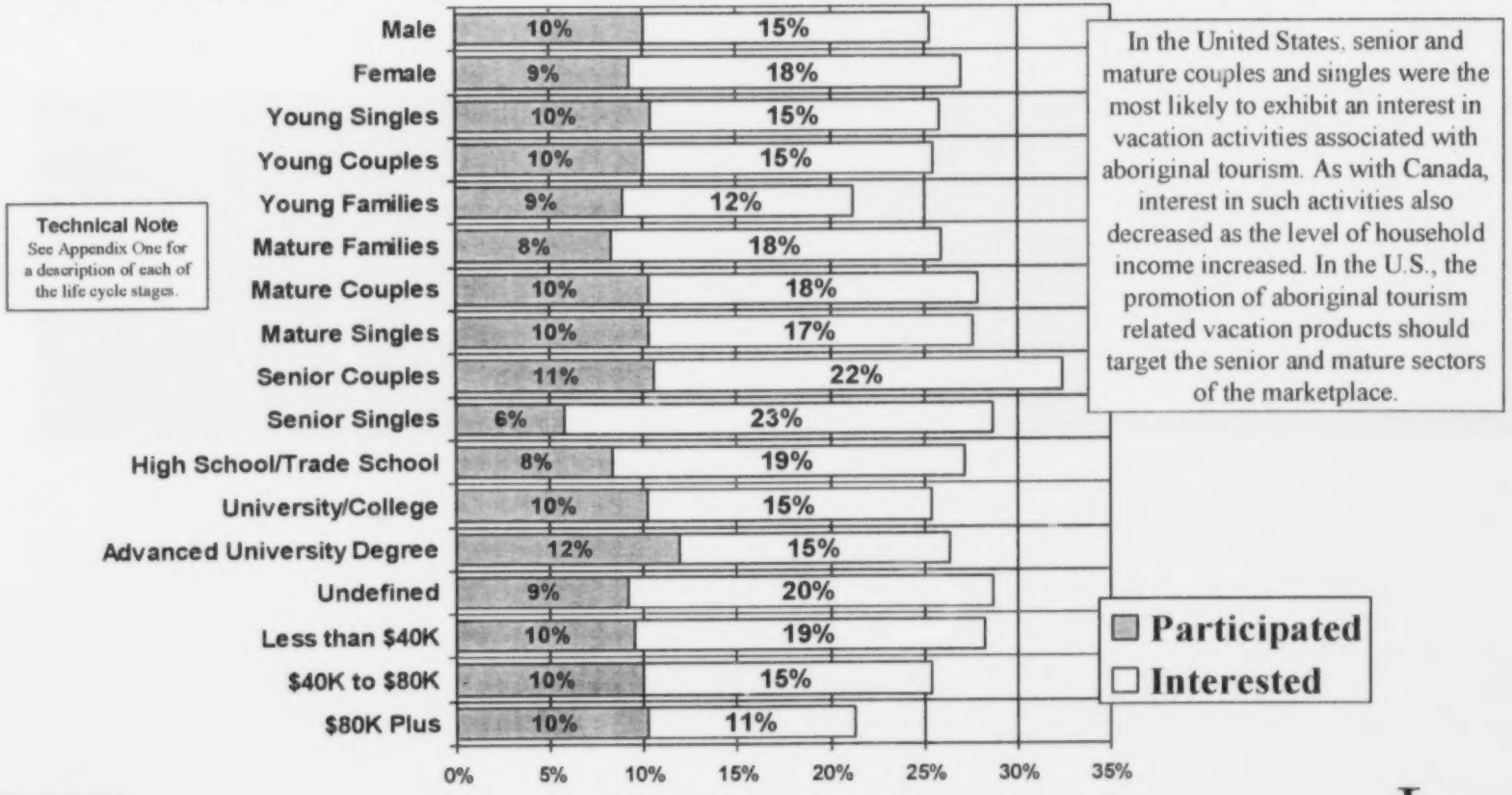
In Canada, senior and mature singles were the most likely to exhibit an interest in vacation activities associated with aboriginal tourism. As well, women were more interested than men. Interest in such activities increased as the level of education increased, but decreased as household income increased. This may reflect the fact that mature and senior singles were more interested in such vacation pursuits, and also tend to report lower household incomes. Overall, promotions of aboriginal tourism related vacation products should target mature and well-educated travellers.

Interest in Aboriginal Tourism

United States: By Demographics

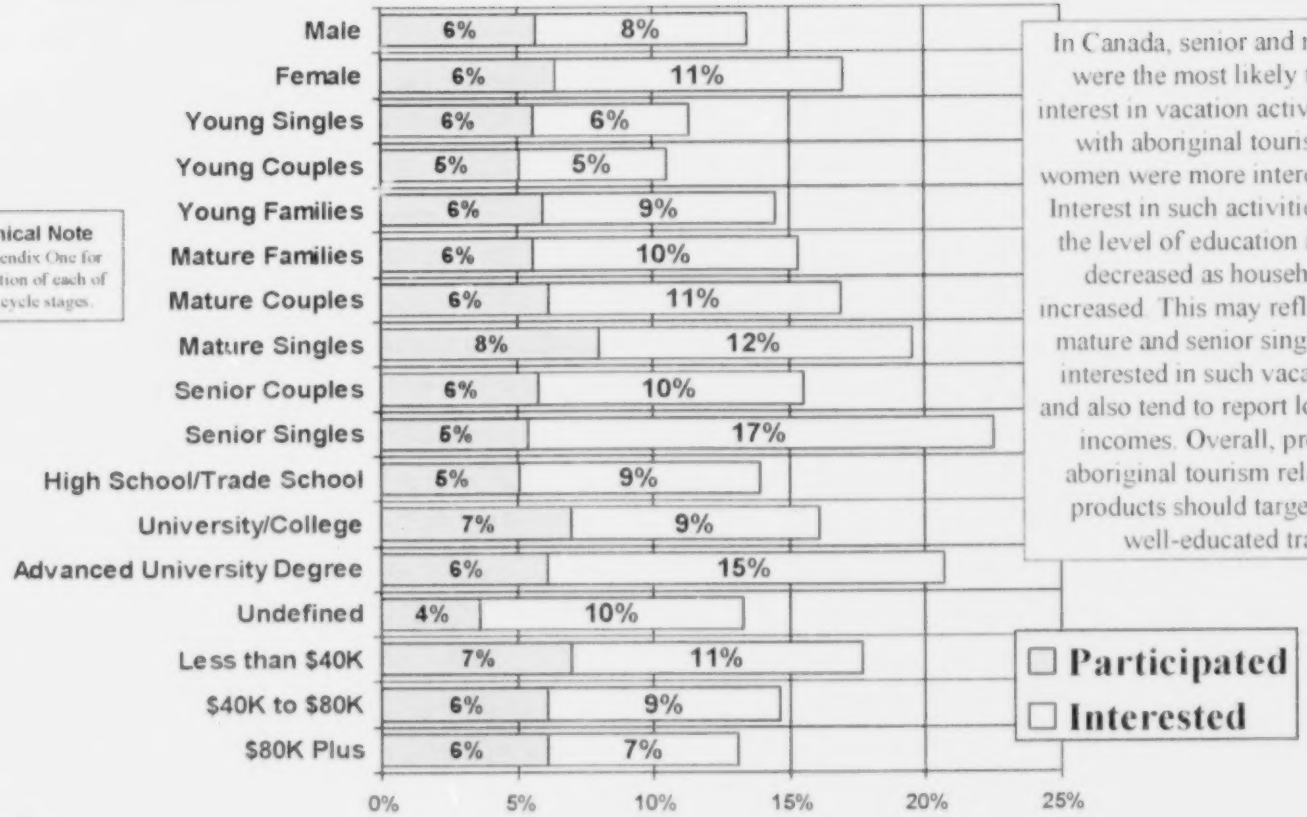
Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



Technical Note
See Appendix One for a description of each of the life cycle stages.

In the United States, senior and mature couples and singles were the most likely to exhibit an interest in vacation activities associated with aboriginal tourism. As with Canada, interest in such activities also decreased as the level of household income increased. In the U.S., the promotion of aboriginal tourism related vacation products should target the senior and mature sectors of the marketplace.



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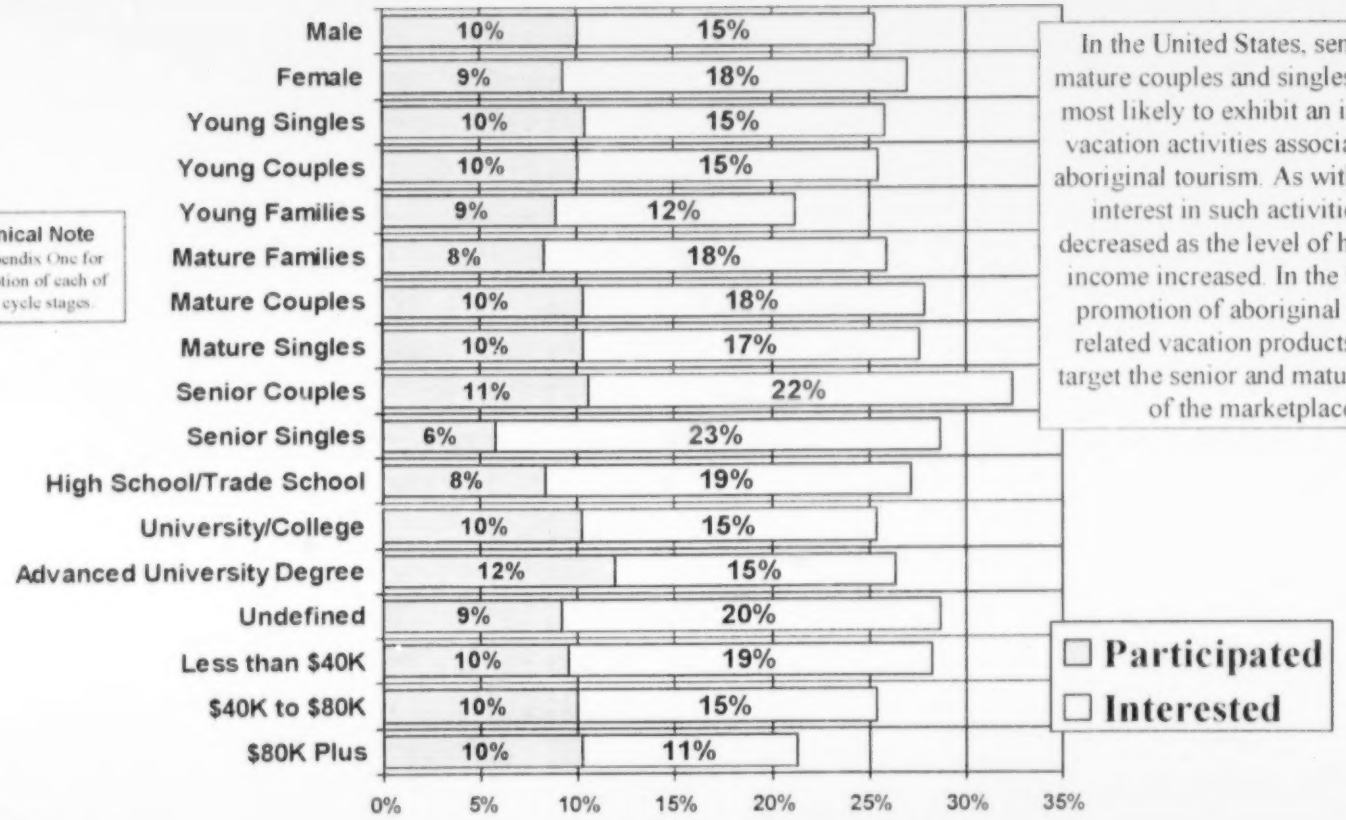

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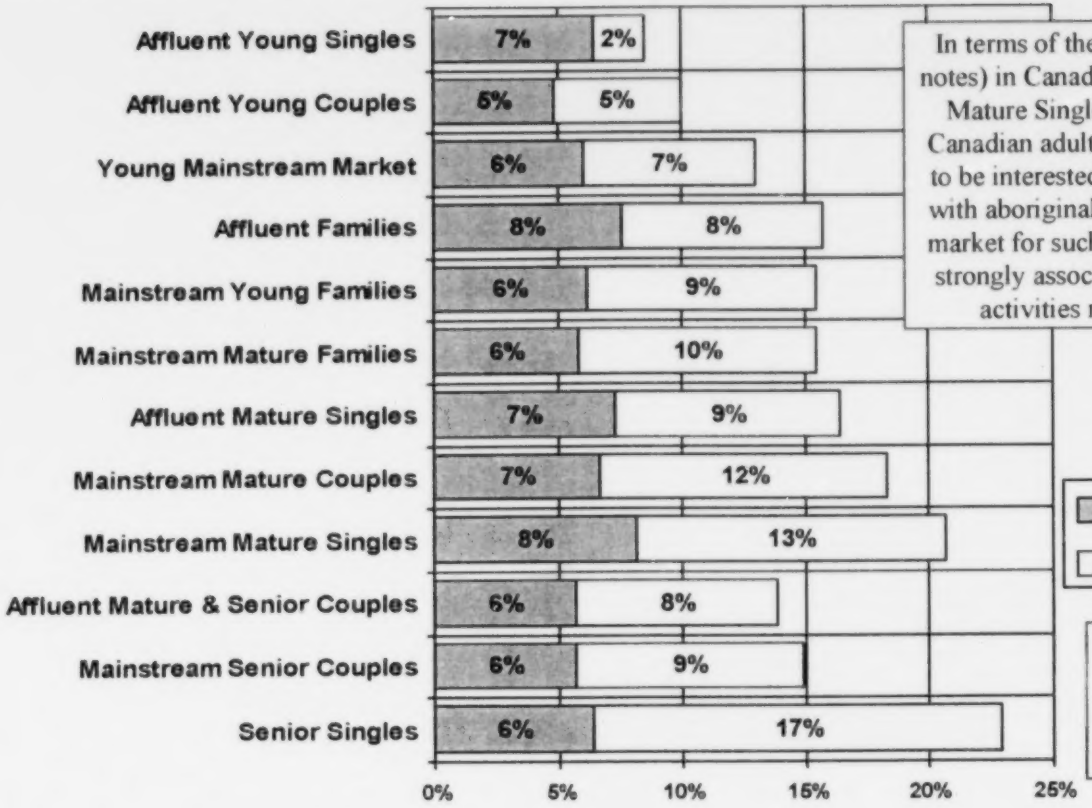
Interest in Aboriginal Tourism
Canada: By Market Segment
Based on Prior Travel Activities and Future Interest
Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

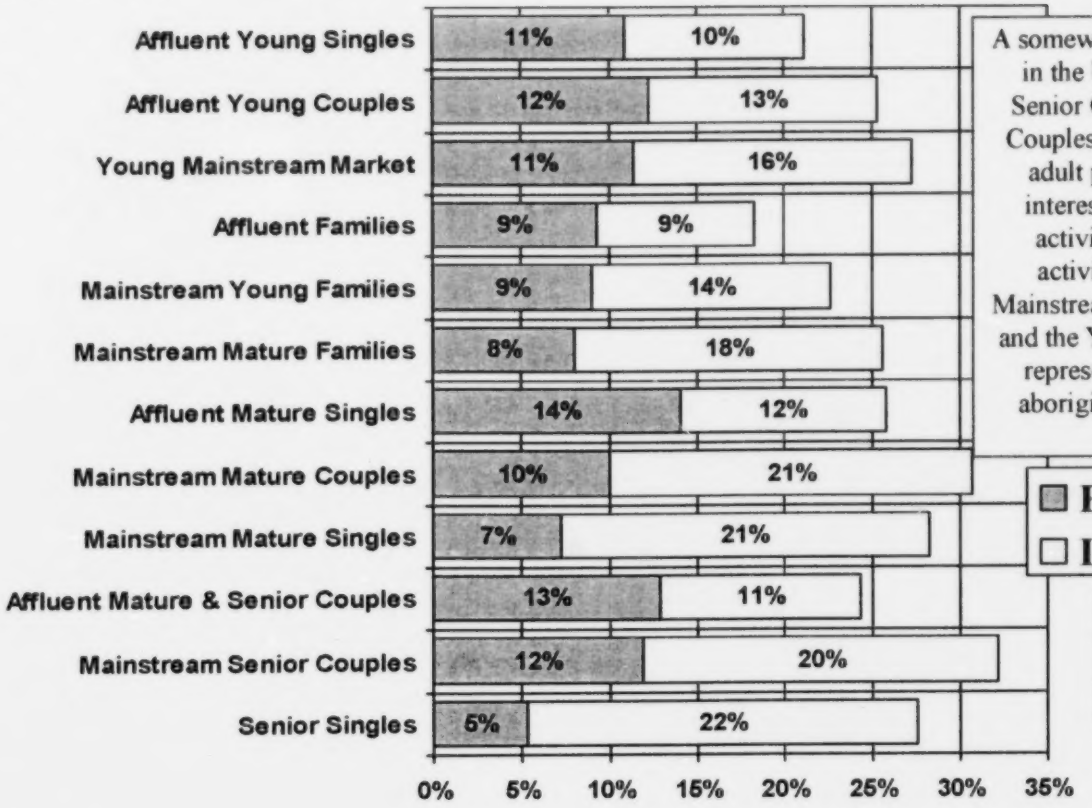


In terms of the market segments (see technical notes) in Canada, Senior Singles and Mainstream Mature Singles, who represent 13.5 % of the Canadian adult population, were the most likely to be interested in vacation activities associated with aboriginal tourism. This is the prime target market for such promotional activities. Age was strongly associated with an interest in vacation activities related to aboriginal tourism.

Technical Note

The market segments used in this analysis have been derived using the Ontario Tourism Marketing Partnership (OTMP) tracking database. See Appendix Two for a description of each of these segments.

Interest in Aboriginal Tourism
United States: By Market Segment
Based on Prior Travel Activities and Future Interest
Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



A somewhat different pattern was observed in the United States, with Mainstream Senior Couples and Mainstream Mature Couples, representing 18.8 % of the U.S. adult population, exhibiting the most interest in aboriginal-related vacation activities. Increased interest in such activities was also observed among Mainstream Mature Singles, Senior Singles and the Young Mainstream Market. These represent the prime target markets for aboriginal tourism related promotional activities in the U. S.

Participated
Interested

Technical Note
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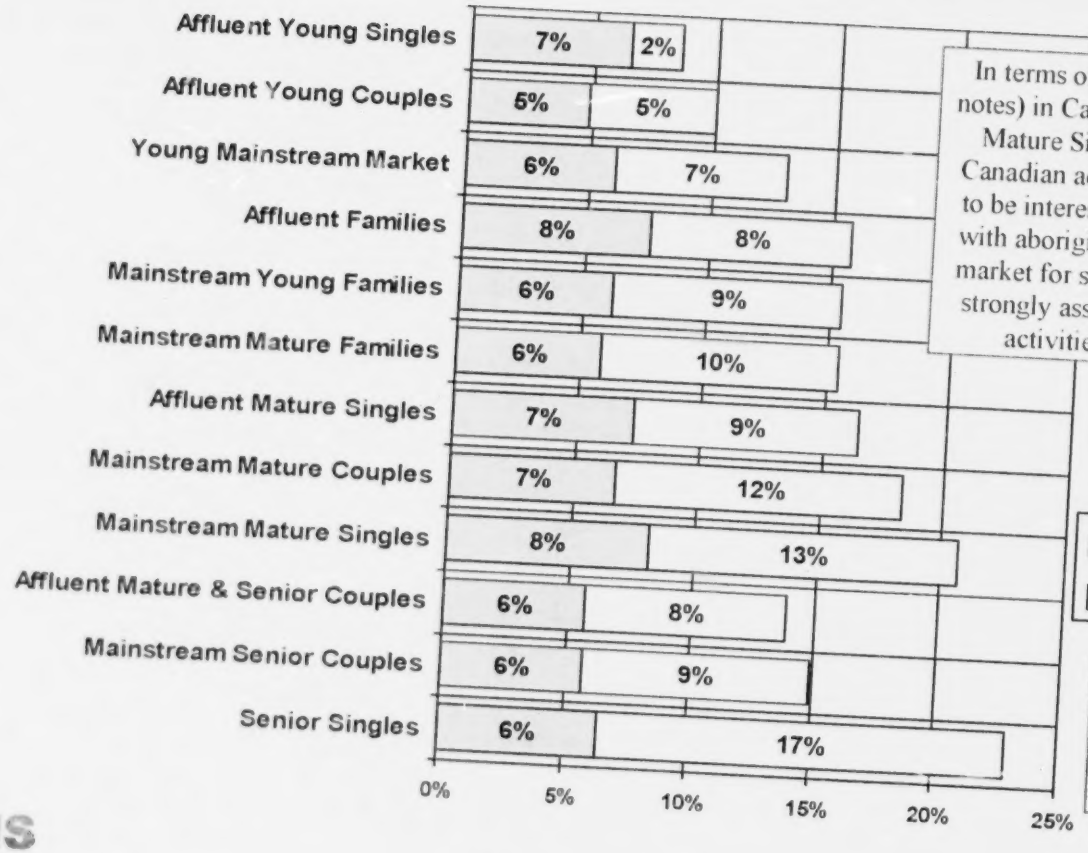

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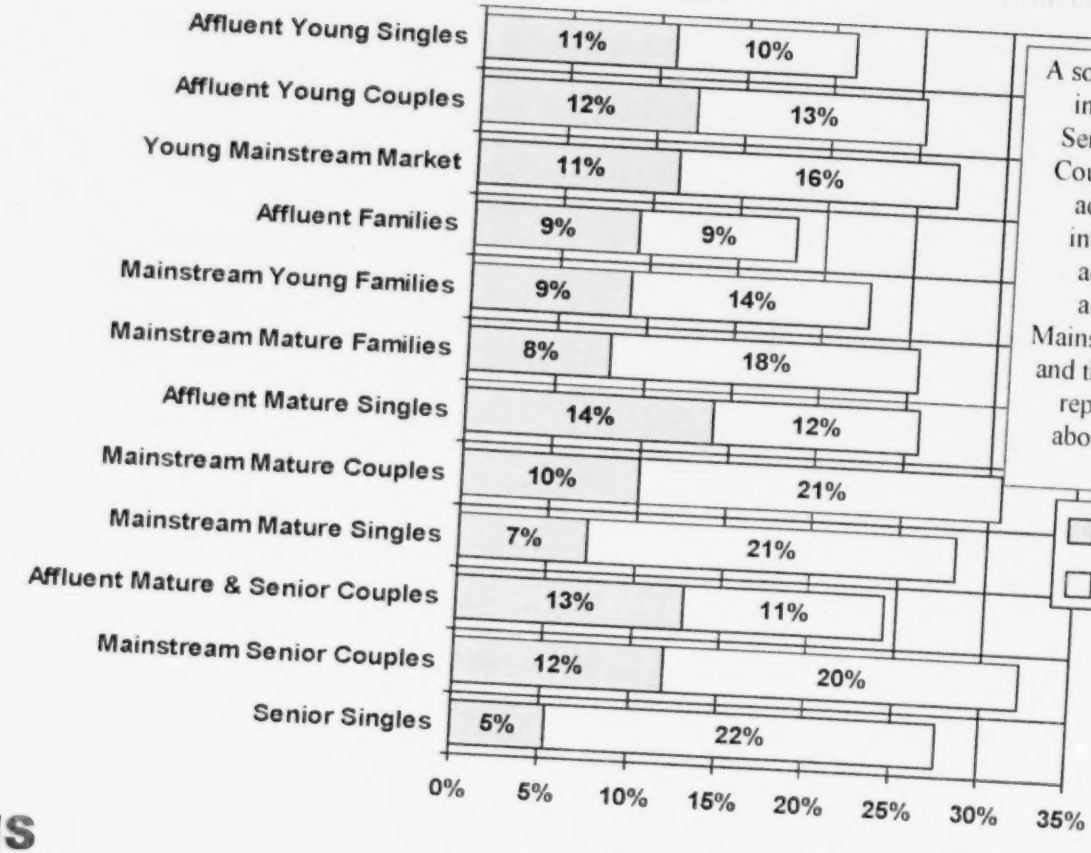

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Participated
Interested

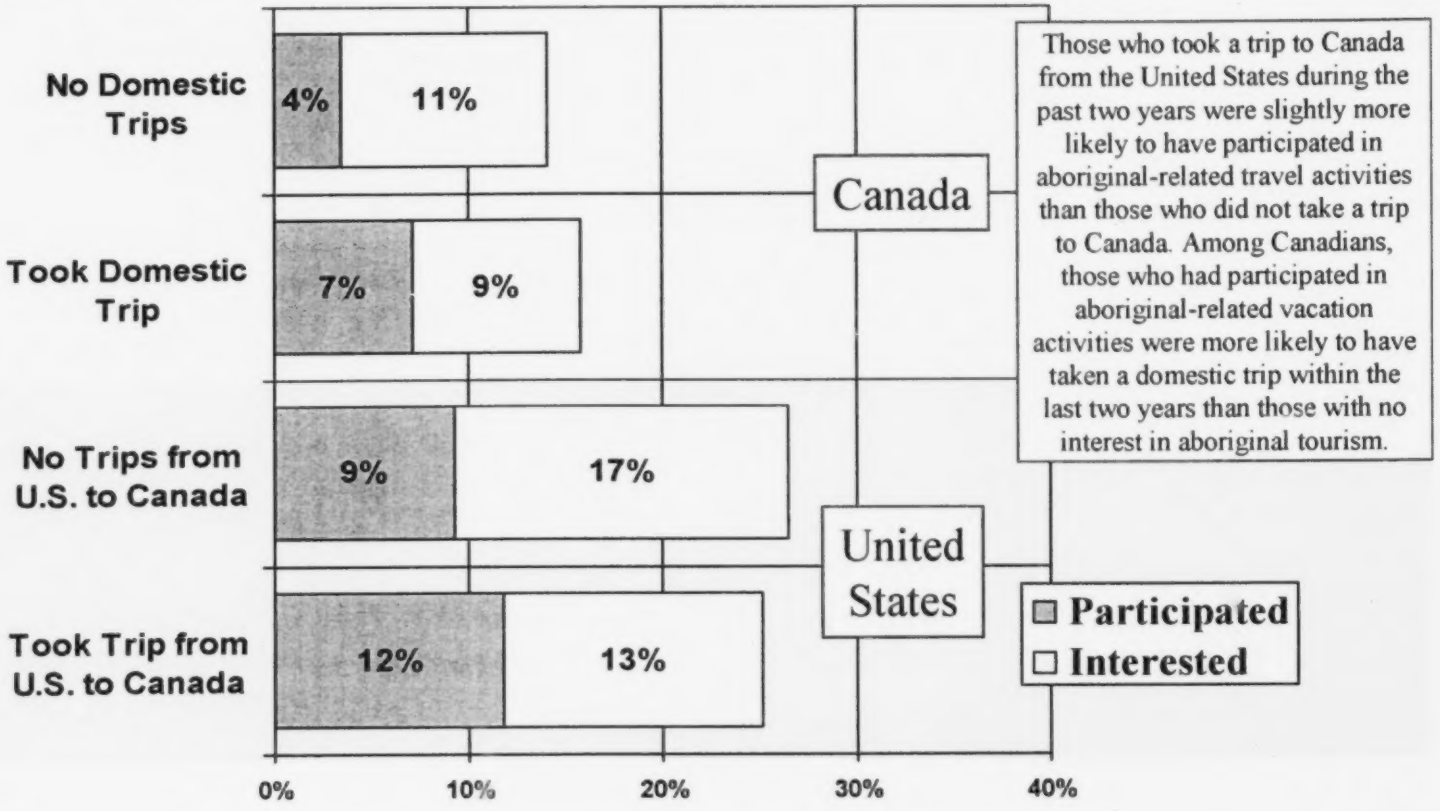
Technical Note
The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

Interest in Aboriginal Tourism

Canada vs. U.S.: By Trips In Canada Last Two Years

Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

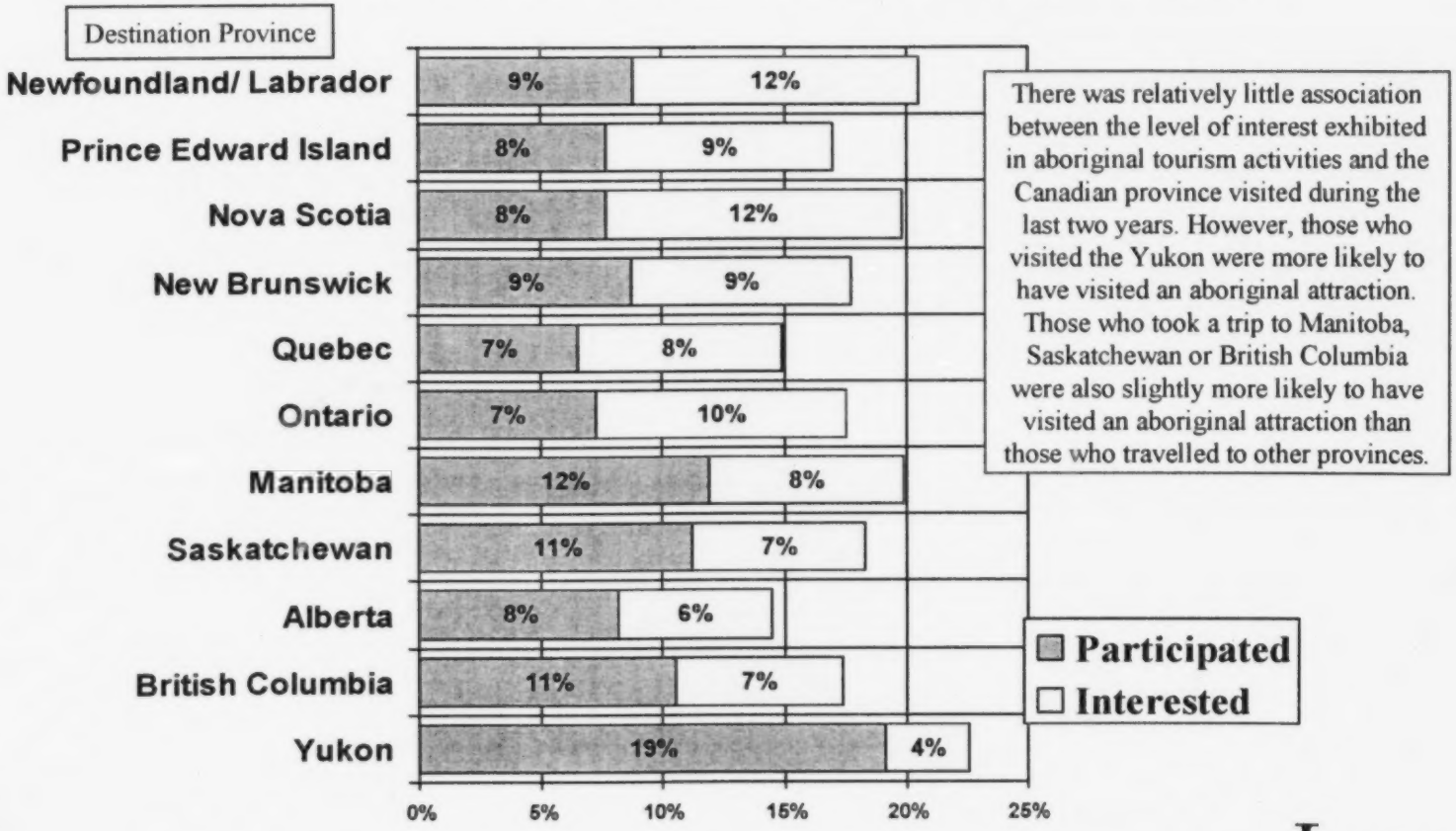

No Domestic Trips
4%
11%
Took Domestic Trip
7%
9%
No Trips from U.S. to Canada
9%
17%
Took Trip from U.S. to Canada
12%
13%
Canada
United States
0%
10%
20%
30%
40%
Participated
Interested
Those who took a trip to Canada from the United States during the past two years were slightly more likely to have participated in aboriginal-related travel activities than those who did not take a trip to Canada. Among Canadians, those who had participated in aboriginal-related vacation activities were more likely to have taken a domestic trip within the last two years than those with no interest in aboriginal tourism.

Interest in Aboriginal Tourism

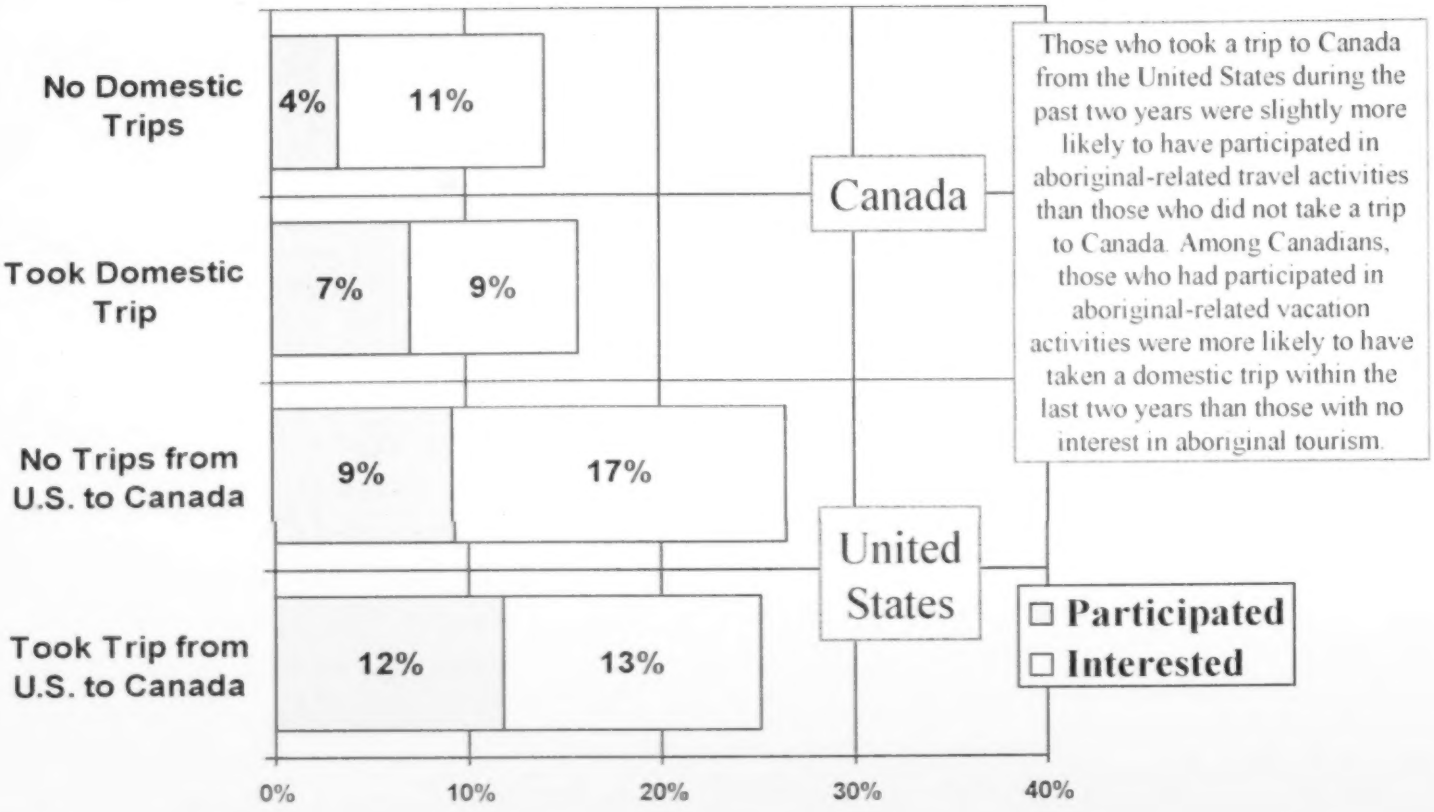
Canada: Interest By Province Travelled To

Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

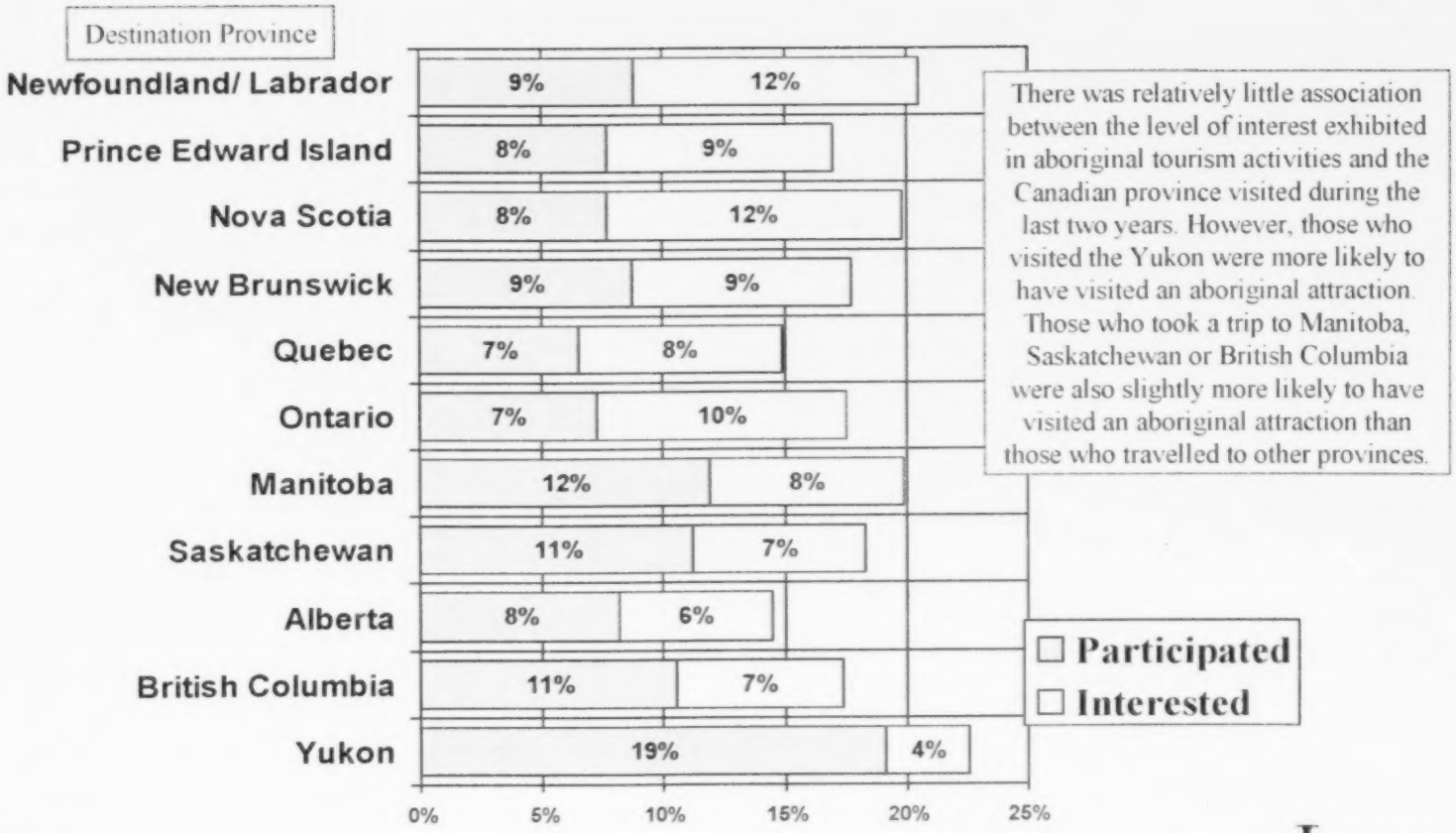
Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years



There was relatively little association between the level of interest exhibited in aboriginal tourism activities and the Canadian province visited during the last two years. However, those who visited the Yukon were more likely to have visited an aboriginal attraction. Those who took a trip to Manitoba, Saskatchewan or British Columbia were also slightly more likely to have visited an aboriginal attraction than those who travelled to other provinces.



Those who took a trip to Canada from the United States during the past two years were slightly more likely to have participated in aboriginal-related travel activities than those who did not take a trip to Canada. Among Canadians, those who had participated in aboriginal-related vacation activities were more likely to have taken a domestic trip within the last two years than those with no interest in aboriginal tourism.



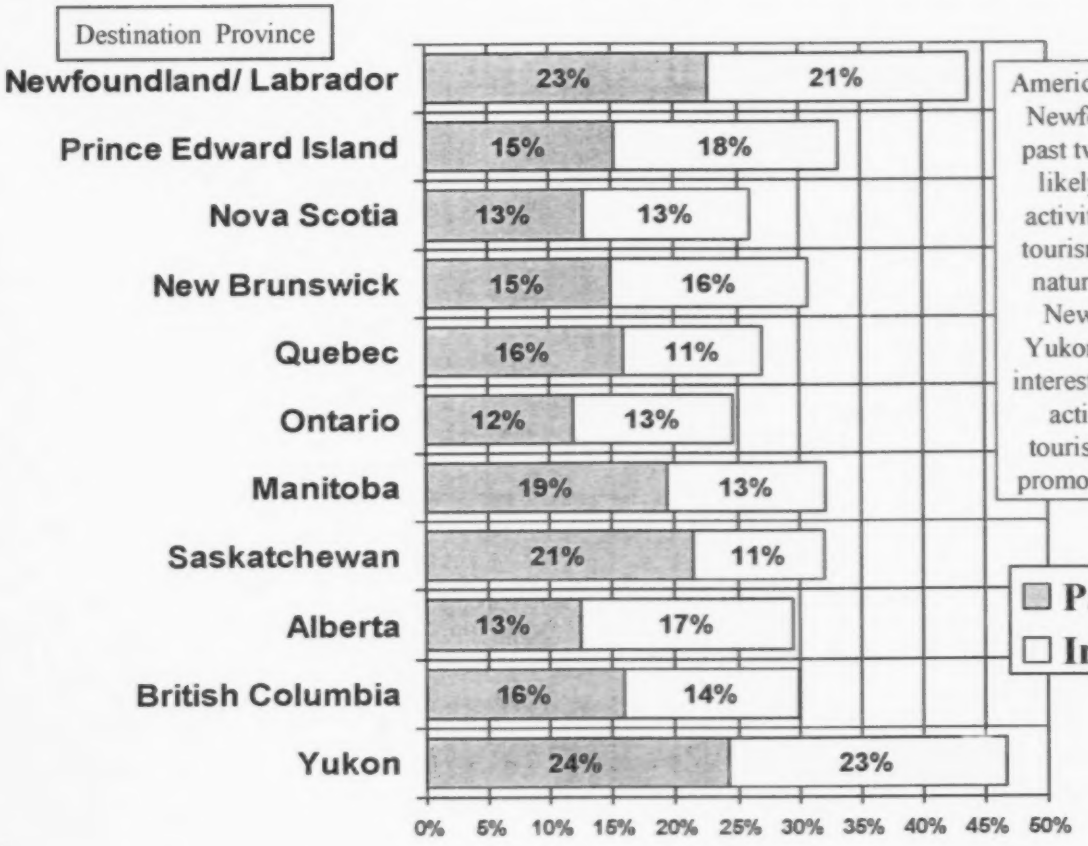
There was relatively little association between the level of interest exhibited in aboriginal tourism activities and the Canadian province visited during the last two years. However, those who visited the Yukon were more likely to have visited an aboriginal attraction. Those who took a trip to Manitoba, Saskatchewan or British Columbia were also slightly more likely to have visited an aboriginal attraction than those who travelled to other provinces.

Interest in Aboriginal Tourism

United States: Interest By Province Travelled To

Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years



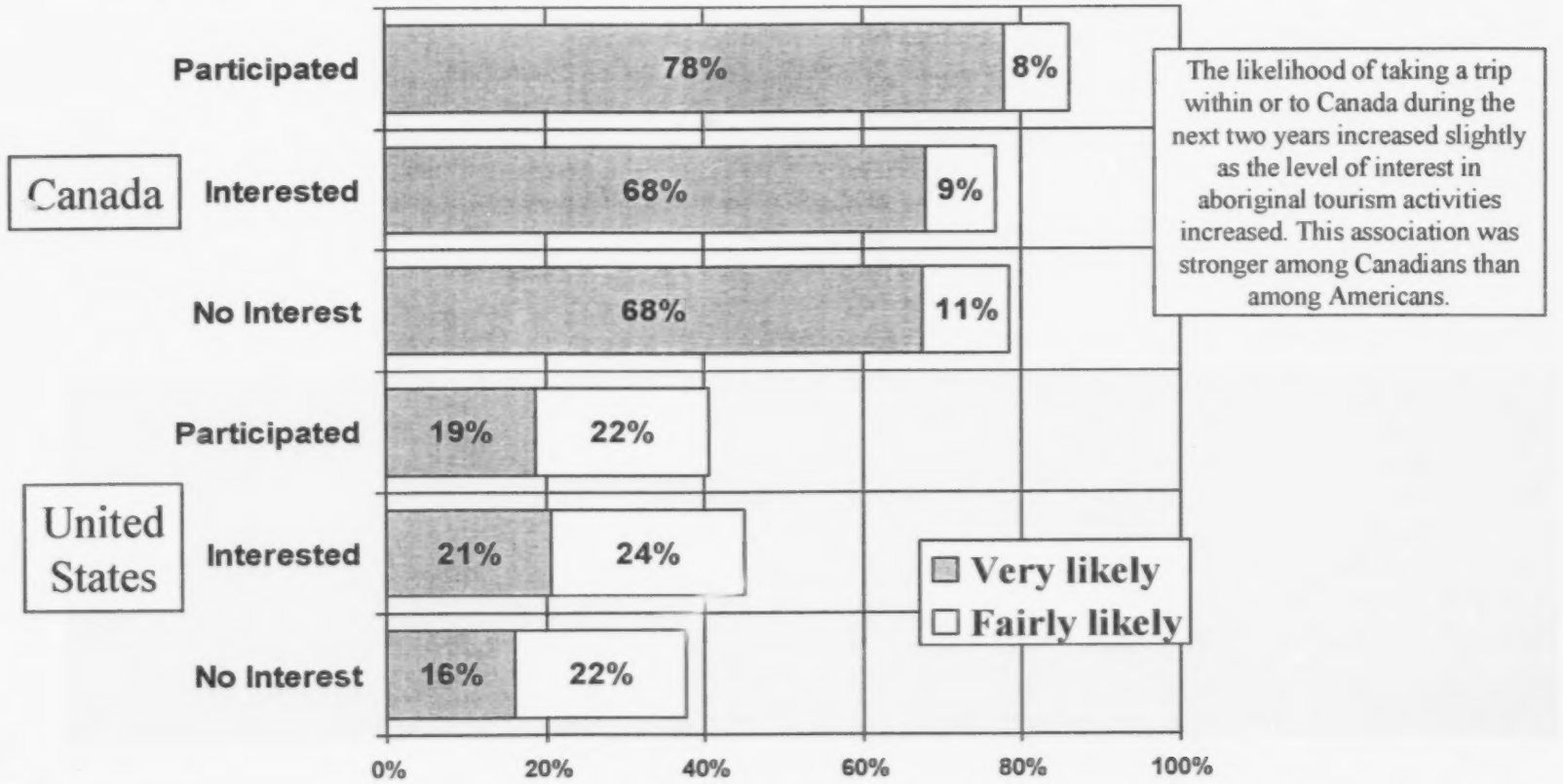
Americans who visited the Yukon and Newfoundland/Labrador during the past two years were somewhat more likely to be interested in vacation activities associated with aboriginal tourism. This suggests that there is a natural affinity between interest in Newfoundland/Labrador and the Yukon as vacation destinations, and interest in aboriginal tourism vacation activities. Promoting aboriginal tourism may be an effective way to promote Canada to the United States.

Interest in Aboriginal Tourism

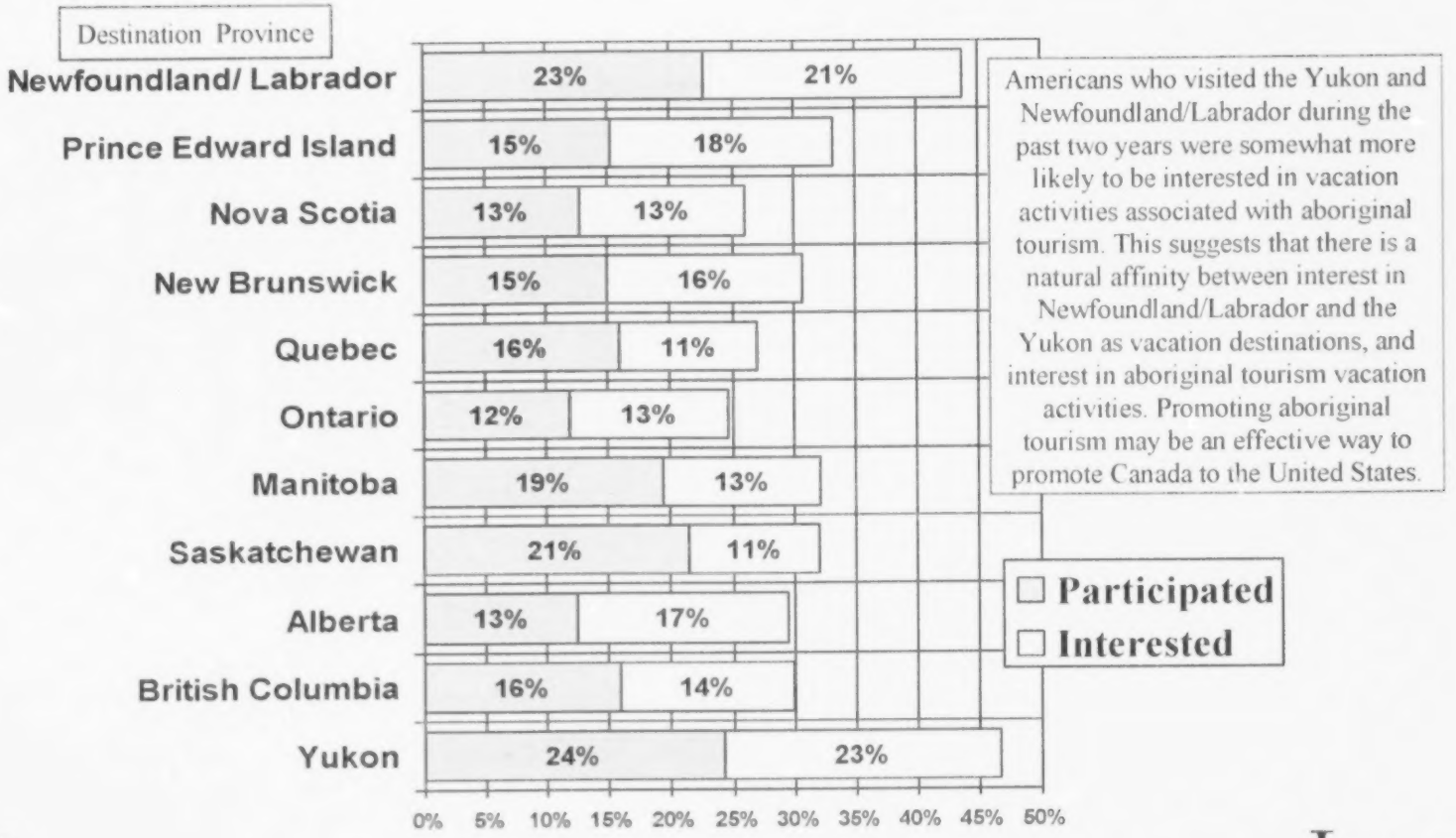
Intentions to Travel to Canada Next Two Years

Interest in Aboriginal Tourism By Intentions to Travel In Canada During Next Two Years

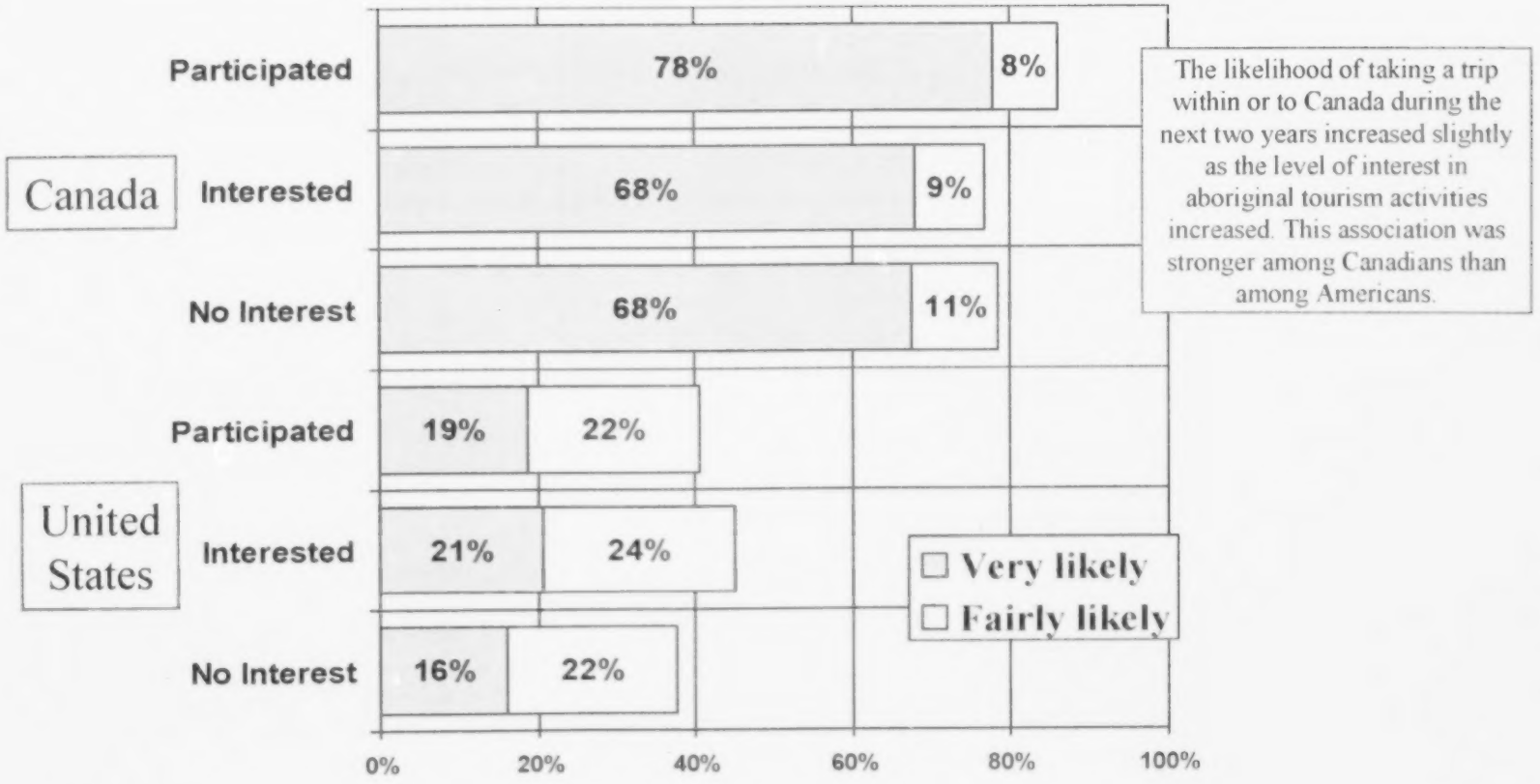
Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



The likelihood of taking a trip within or to Canada during the next two years increased slightly as the level of interest in aboriginal tourism activities increased. This association was stronger among Canadians than among Americans.



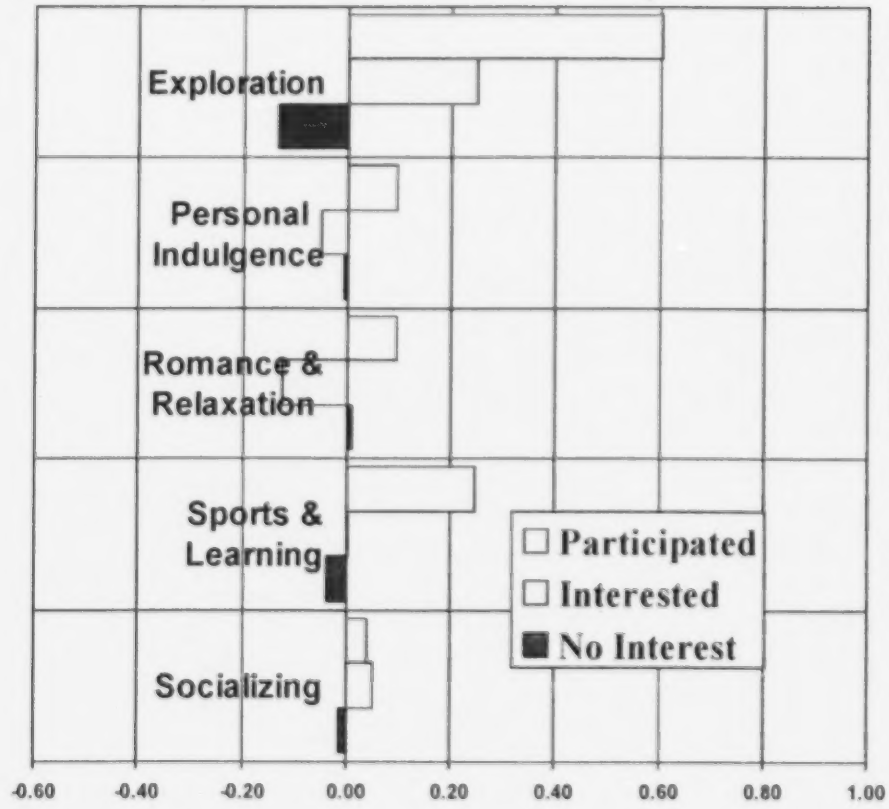
Americans who visited the Yukon and Newfoundland/Labrador during the past two years were somewhat more likely to be interested in vacation activities associated with aboriginal tourism. This suggests that there is a natural affinity between interest in Newfoundland/Labrador and the Yukon as vacation destinations, and interest in aboriginal tourism vacation activities. Promoting aboriginal tourism may be an effective way to promote Canada to the United States.



The likelihood of taking a trip within or to Canada during the next two years increased slightly as the level of interest in aboriginal tourism activities increased. This association was stronger among Americans.

General Vacation Experiences Sought During Pleasure Travel in the Past Two Years By Interest in Aboriginal Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



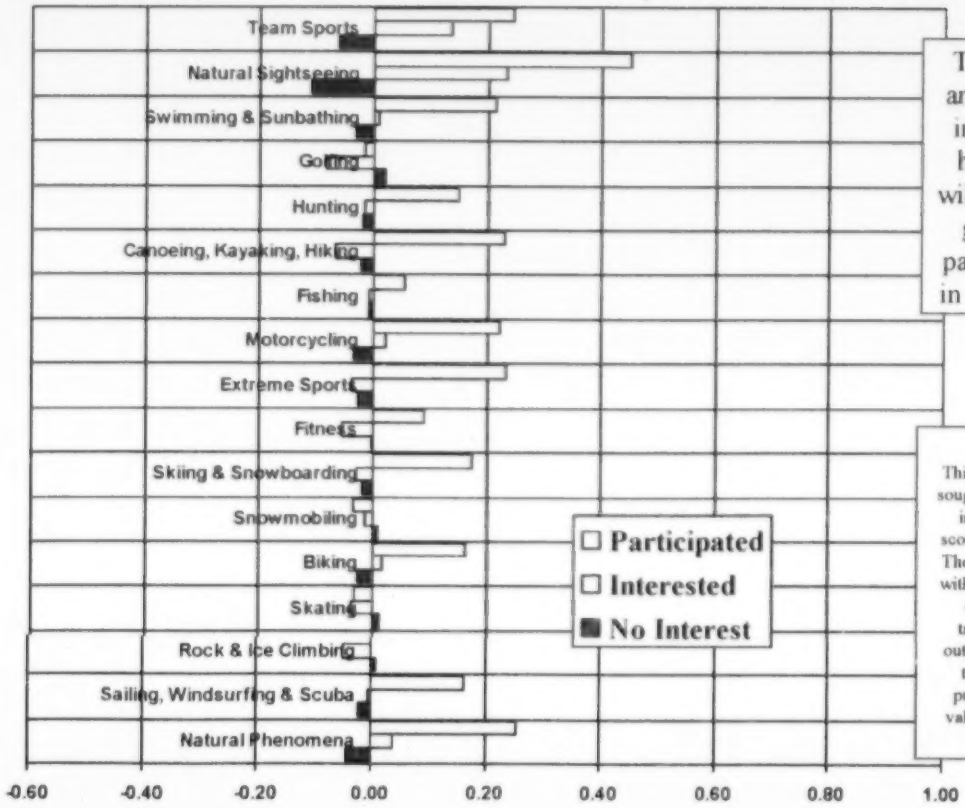
Those who had participated in vacation activities associated with aboriginal tourism were considerably more likely to have sought out vacation experiences associated with exploration (e.g., visiting historical sites, natural wonders), and sports and learning (e.g., to experience a hands-on learning experience). Advertising and promotional materials designed to promote aboriginal tourism products should emphasize the cultural and educational aspects of the destination, and should specifically target more mature singles and couples.

Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past Two Years By Interest in Aboriginal Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



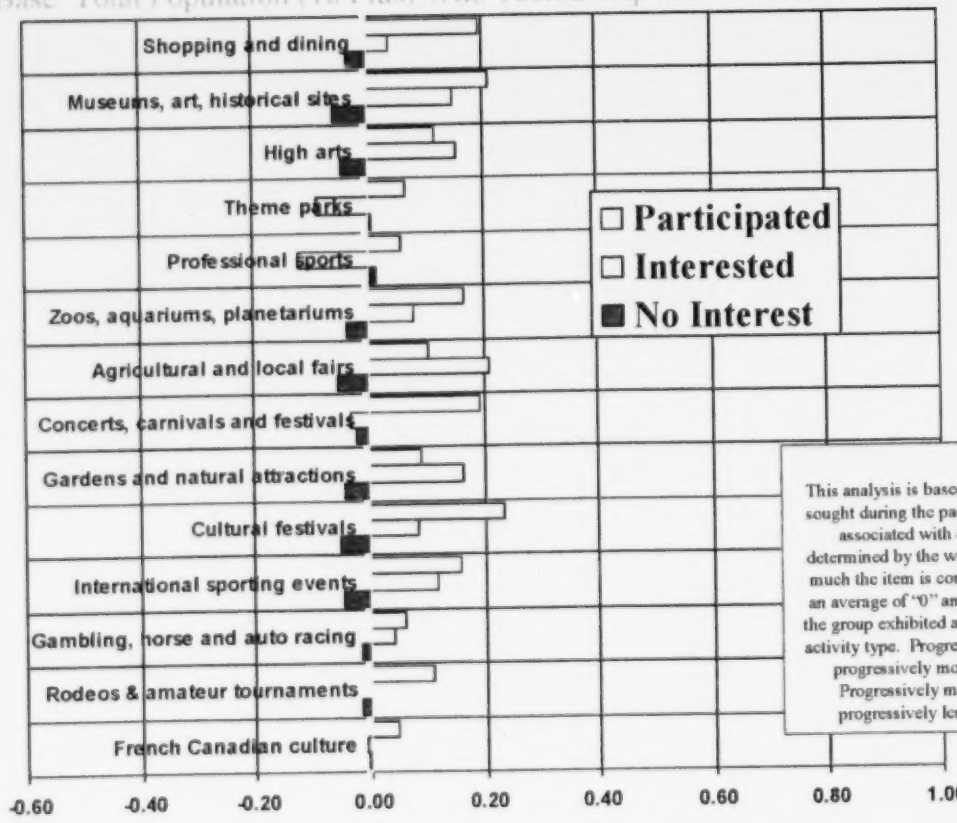
Those who participated in aboriginal tourism, and to a certain extent, those who expressed an interest in such activities, were more likely to have participated in natural sightseeing (e.g., wildflower and flora viewing, birdwatching, and going on picnics in park settings). This may partly reflect the fact that those with an interest in aboriginal tourism tend to be older travellers.

Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given outdoor vacation activity type. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the outdoor vacation activity type. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the outdoor vacation activity type.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past Two Years By Interest in Aboriginal Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



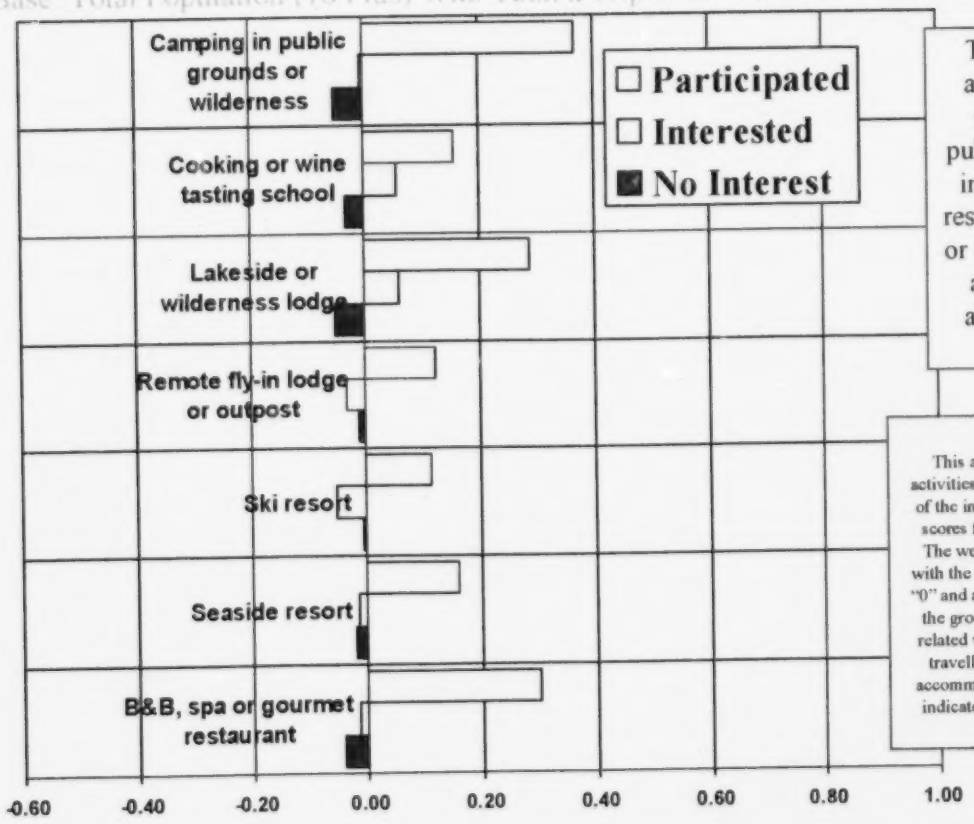
There was a weak association between an interest in vacation activities associated with aboriginal tourism and the likelihood of participation in most other cultural and entertainment activities while on a trip.

Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given cultural and entertainment vacation activity type. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the cultural and entertainment activity type. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the cultural and entertainment activity type.

Accommodation-Related Activities Sought During Pleasure Travel in the Past Two Years By Interest in Aboriginal Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years, Canada & U.S. (Mailback Survey)



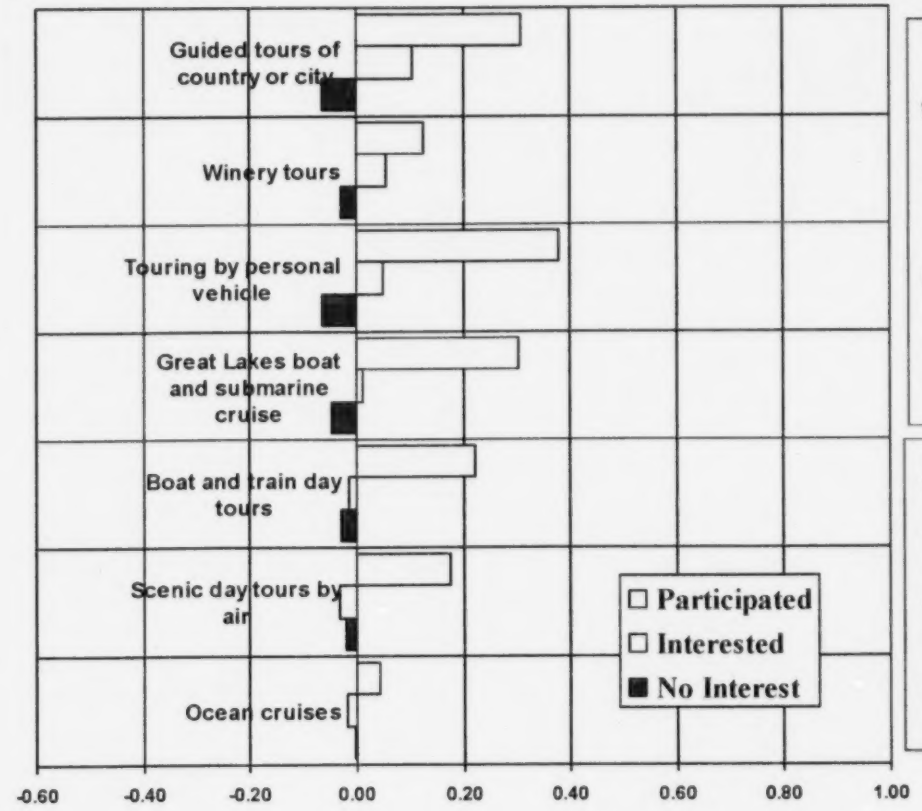
Those who exhibited an interest in vacation activities associated with aboriginal tourism were also more likely to have camped in a public campground or in the wilderness, stayed in a bed and breakfast, health spa or gourmet restaurant (with accommodations), or a lakeside or wilderness lodge. There was only a moderate association between an interest in activities associated with aboriginal tourism and other accommodation-related activities.

Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given accommodation-related vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the accommodation-related vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the accommodation-related vacation activity.

Day and Overnight Touring Activities in the Past Two Years By Interest in Aboriginal Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



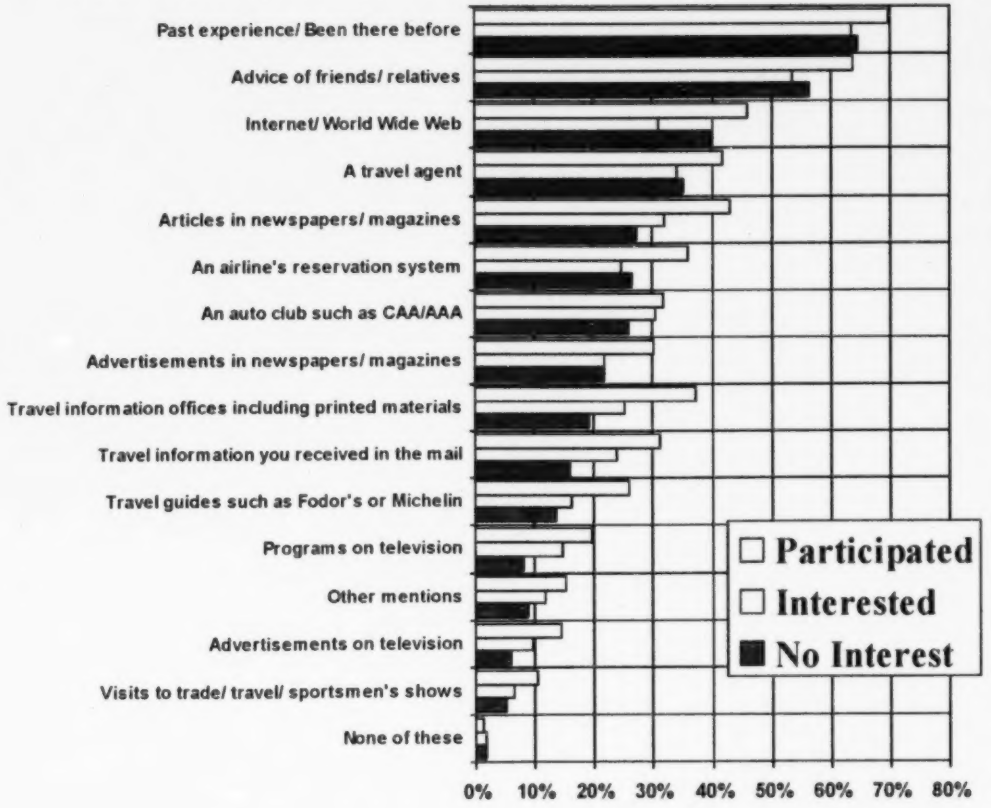
Those who participated in aboriginal tourism activities were also more likely to have toured in their own personal vehicles (e.g., coastal or lakeshore scenic drives by day, wandering around small villages and towns) during the past two years. There is also a slight association between participation in aboriginal-related tourism attractions and taking a guided tour of the country or city, a Great Lakes boat cruise or submarine cruise, a boat or train day tour, and scenic day tour by air. Overall, the association between an interest in aboriginal tourism attractions and touring activities was relatively modest.

Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to participate in a given type of touring activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have participated in a given type of touring activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have participated in a given type of touring activity.

Sources of Information Consulted to Plan Brief Vacations By Interest in Aboriginal Tourism

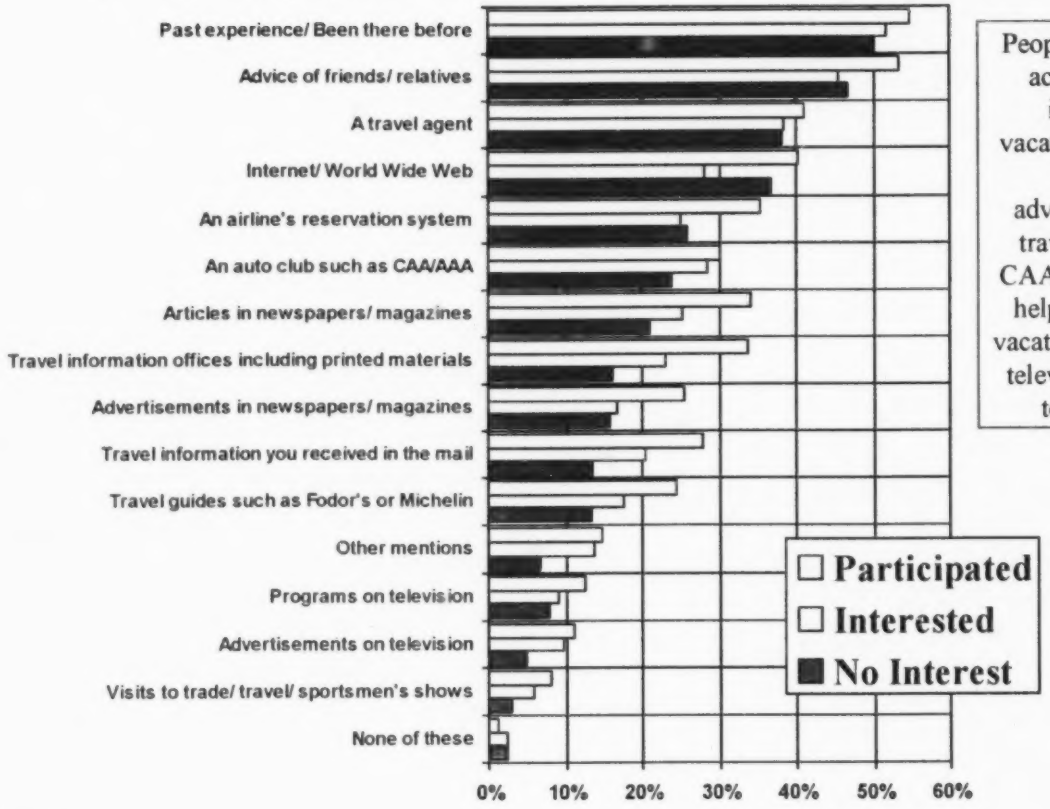
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Those who participated in vacation activities associated with aboriginal tourism tend to have consulted a larger number of information sources to plan their brief vacations, relative to other travellers. They were especially likely to have used articles in newspapers and magazines, travel information offices and travel guides (e.g., Fodor's) to help plan their brief vacations. Therefore, print media will be more effective than television to promote aboriginal tourism.

Sources of Information Consulted to Plan Longer Vacations By Interest in Aboriginal Tourism

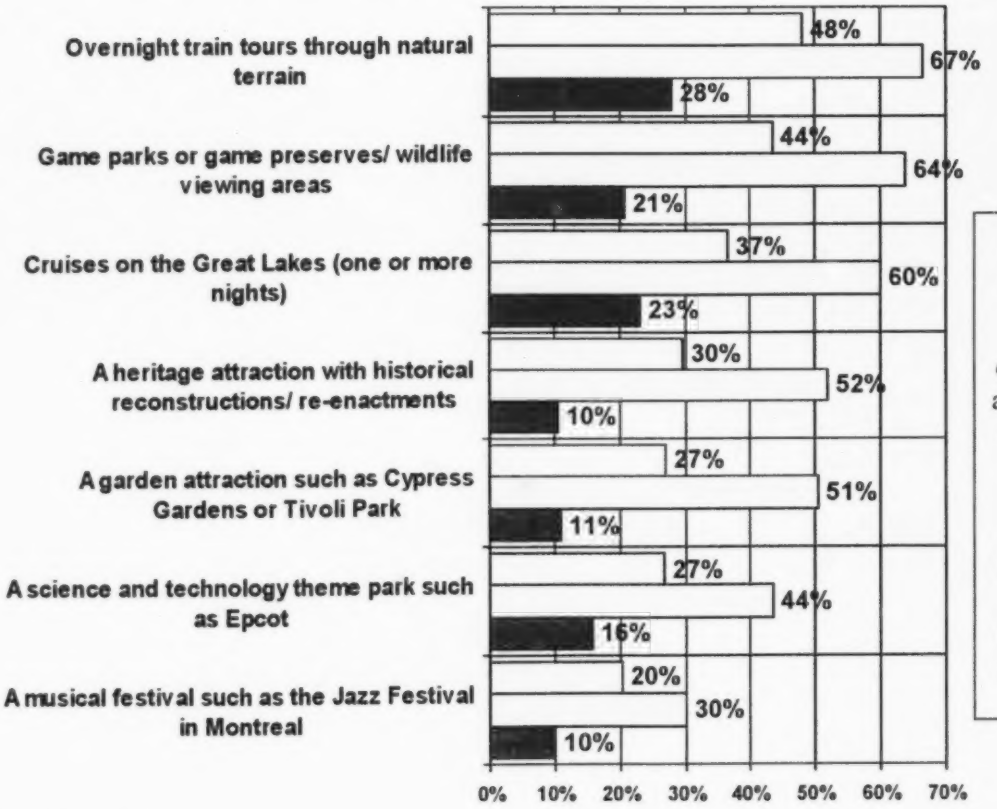
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



People interested in aboriginal tourism vacation activities also consulted a larger number of information sources to plan their longer vacations, relative to other travellers. They were more likely to have used articles and advertisements in newspapers and magazines, travel information offices, auto clubs such as CAA/AAA, and travel guides such as Fodor's to help plan their longer vacations. As with brief vacations, print media will be more effective than television or other media to promote aboriginal tourism related longer vacation products.

Interest in New Tourism Products
By Interest in Aboriginal Tourism (Part One of Two)

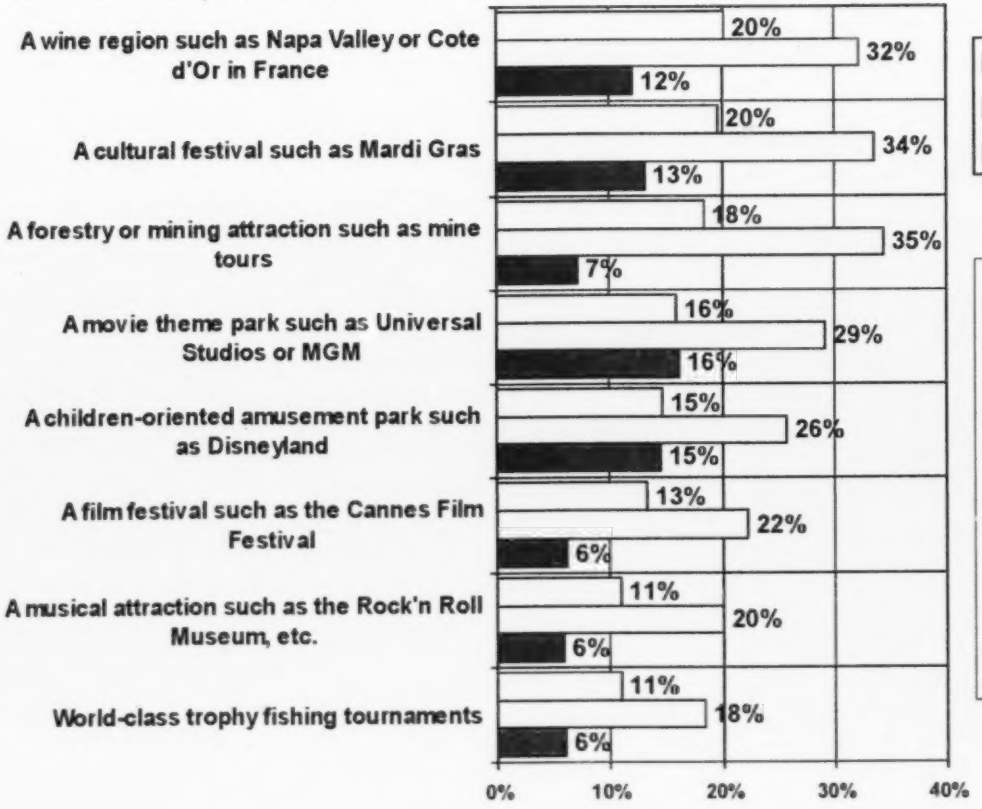
Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Respondents were asked whether each of 16 new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular attractions assessed, those who exhibited an interest in an aboriginal attraction were also more likely to express an interest in all the other attractions. This partly reflects the fact that interest in one type of attraction is likely to be associated with interest in other attractions. Those who participated in an aboriginal attraction during the past two years were also more likely to express an interest in nature-oriented attractions, such as an overnight train tour through natural terrain, a game park or game preserve with wildlife viewing areas, and a cruise on the Great Lakes.

Interest in New Tourism Products
By Interest in Aboriginal Tourism (Part Two of Two)

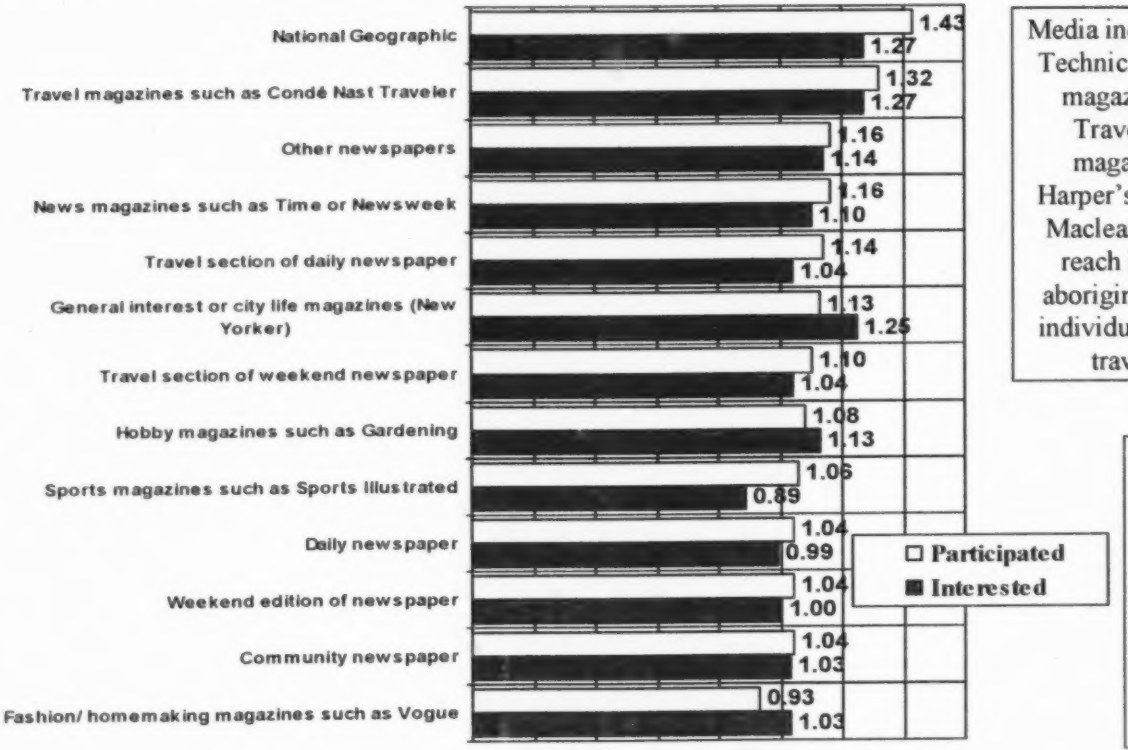
Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Those who had participated in activities associated with aboriginal tourism were also more likely to be interested in nature-oriented attractions, such as a wine region tour, and a forestry or mining attraction, relative to those with no interest in aboriginal tourism. There was also an association between participation in an aboriginal-related tourism attraction and an interest in film festivals, cultural festivals, musical attractions and world-class fishing tournaments. Combining aboriginal tourism activities with other nature-oriented attractions would be effective for this market.

Media Index for Print Media: Canada & United States
By High Interest in Aboriginal Tourism

Percent Reading Each Publication Type Among Those With High Interest in Aboriginal Tourism
By Percent Reading Each Type of Publication in General Market
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for types of print media (see Technical Note below) suggests that travel magazines (e.g., National Geographic, Travel and Leisure), general interest magazines (e.g., The New Yorker or Harper's) and news magazines (e.g., Time, Maclean's) are the most efficient ways to reach individuals who are interested in aboriginal-related tourism activities. Such individuals are also more likely to read the travel section of their newspaper.

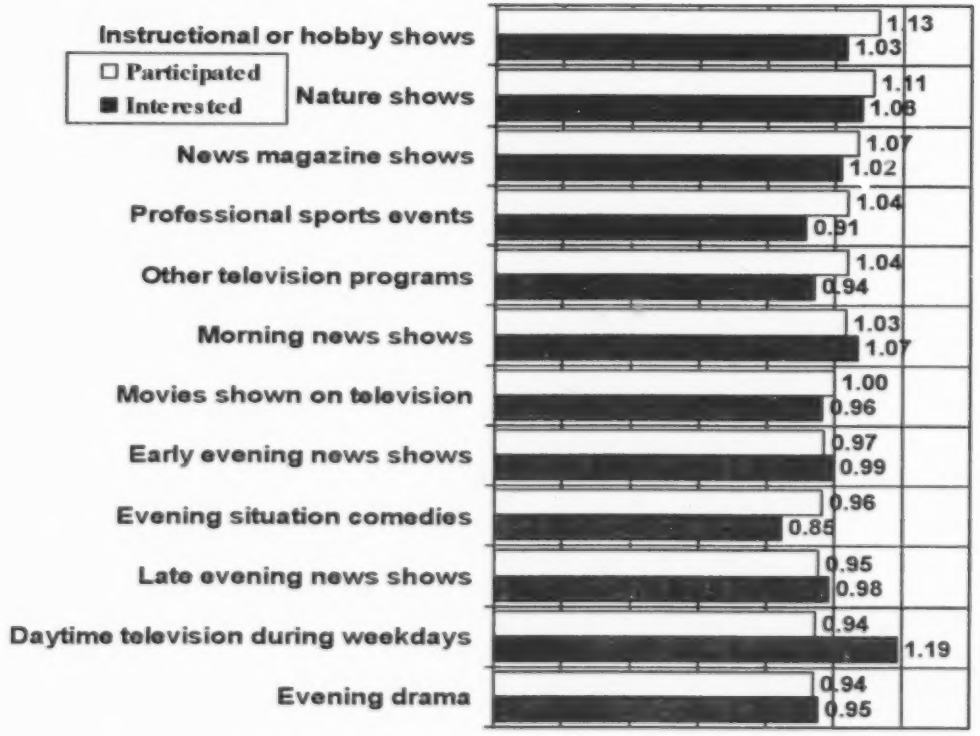
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that people very interested in aboriginal tourism were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programs: Canada & United States
By High Interest in Aboriginal Tourism

Percent Watching Each Type of Television Program Among Those With High Interest in Aboriginal Tourism By Percent Watching Each Program Type in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)


Participated
Interested
Instructional or hobby shows 1.13 1.03
Nature shows 1.11 1.08
News magazine shows 1.07 1.02
Professional sports events 1.04 0.91
Other television programs 1.04 0.94
Morning news shows 1.03 1.07
Movies shown on television 1.00 0.96
Early evening news shows 0.97 0.99
Evening situation comedies 0.96 0.85
Late evening news shows 0.95 0.98
Daytime television during weekdays 0.94 1.19
Evening drama 0.94 0.95

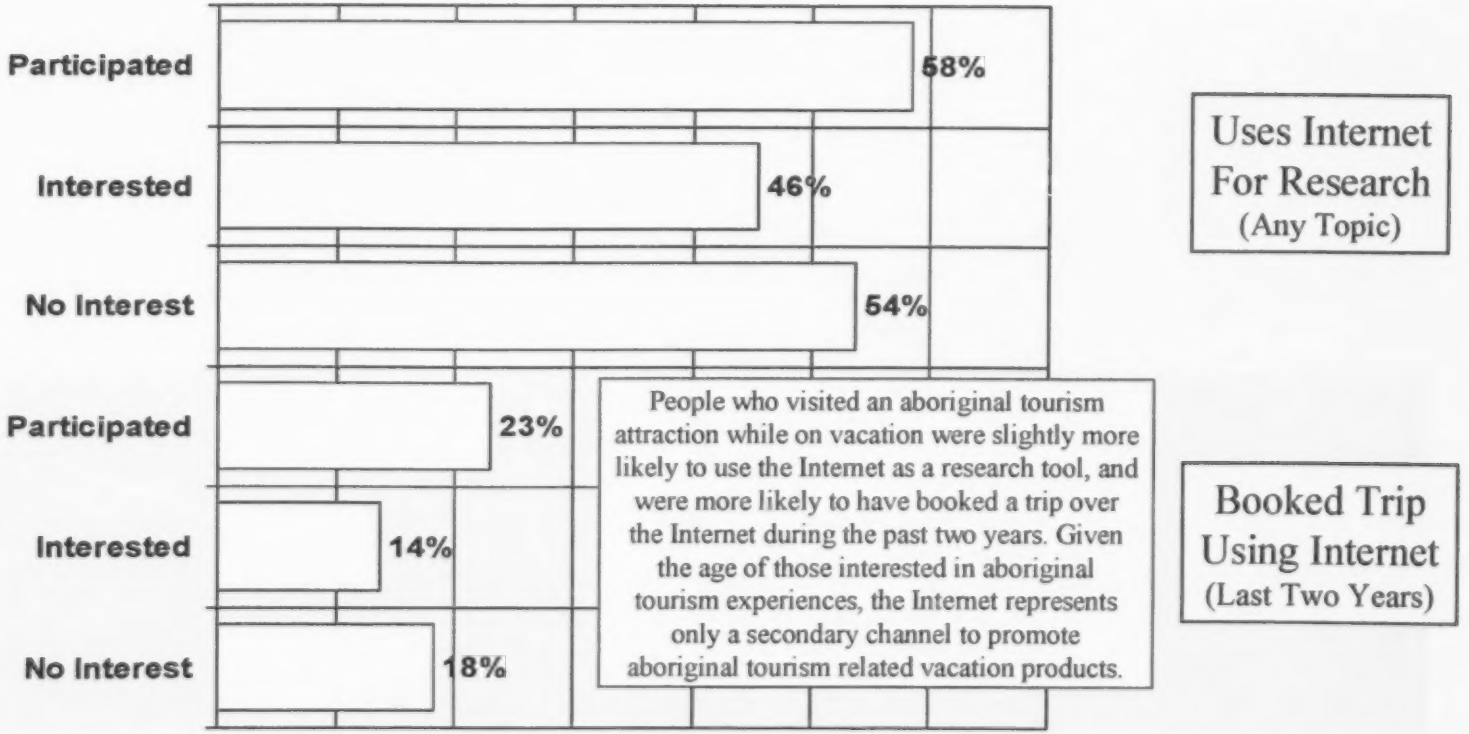
Those interested in vacation activities associated with aboriginal tourism were slightly more likely to watch instructional or hobby shows and nature shows, and less likely to watch evening sitcoms and dramas. Apart from this, there is little association between television viewer preferences and interest in vacation activities associated with aboriginal tourism. Overall, television is not recommended to promote aboriginal tourism activities, since travel print media is more often consulted to plan vacations.

Technical Note

The Media Index is computed by dividing the percent within each segment routinely viewing each program type by the percent in the total market who routinely views each program type. A score of 1.0 means that viewership is the same as the total market. Index values above 1.0 indicate that the viewership is above average while index values below 1.0 indicate that viewership is below average. For example, an index value of 1.2 means that people very interested in aboriginal tourism were 20 % more likely to watch a particular program type than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet
By Interest in Aboriginal Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)


Participated
58%
Interested
46%
No Interest
54%
Participated
23%
Interested
14%
No Interest
18%
People who visited an aboriginal tourism attraction while on vacation were slightly more likely to use the Internet as a research tool, and were more likely to have booked a trip over the Internet during the past two years. Given the age of those interested in aboriginal tourism experiences, the Internet represents only a secondary channel to promote aboriginal tourism related vacation products.
Uses Internet For Research (Any Topic)
Booked Trip Using Internet (Last Two Years)

Destination Image Mapping

- Technical Explanation -

Respondents were asked to assess the image of Canada and Ontario on a 10-point rating scale for 25 image attributes. These ratings were factor analysed to identify general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant, it is considered to offer excellent opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in the upper right quadrant, it is perceived as a hybrid destination, offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

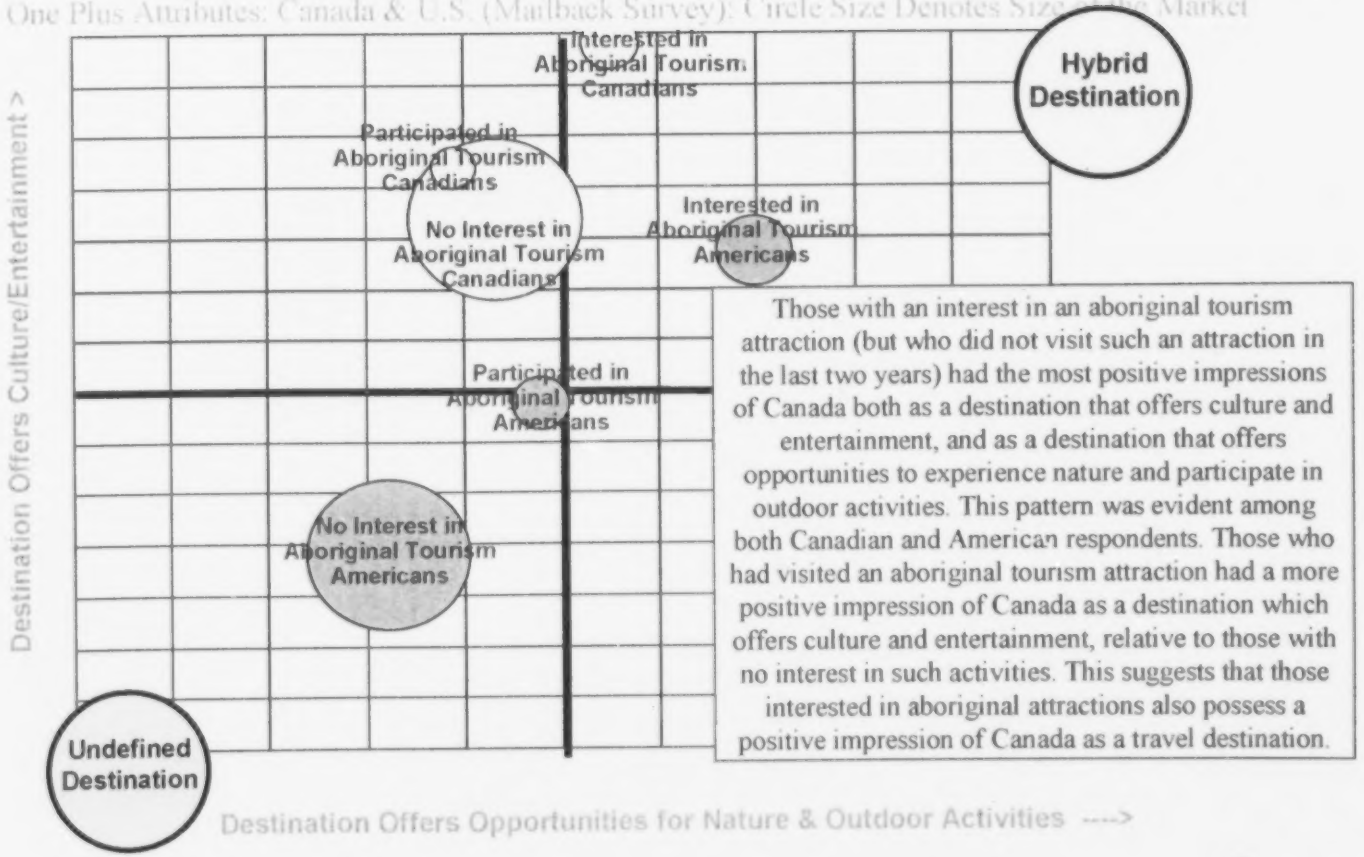
Hybrid Destination
Culture & Entertainment Only
Culture/ Entertainment & Nature/Outdoor Activities
Neither Culture/ Entertainment nor Nature/Outdoor Activities
Nature & Outdoor Activities Only
Undefined Destination
Destination Offers Opportunities for Culture & Entertainment ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->

Canada and United States

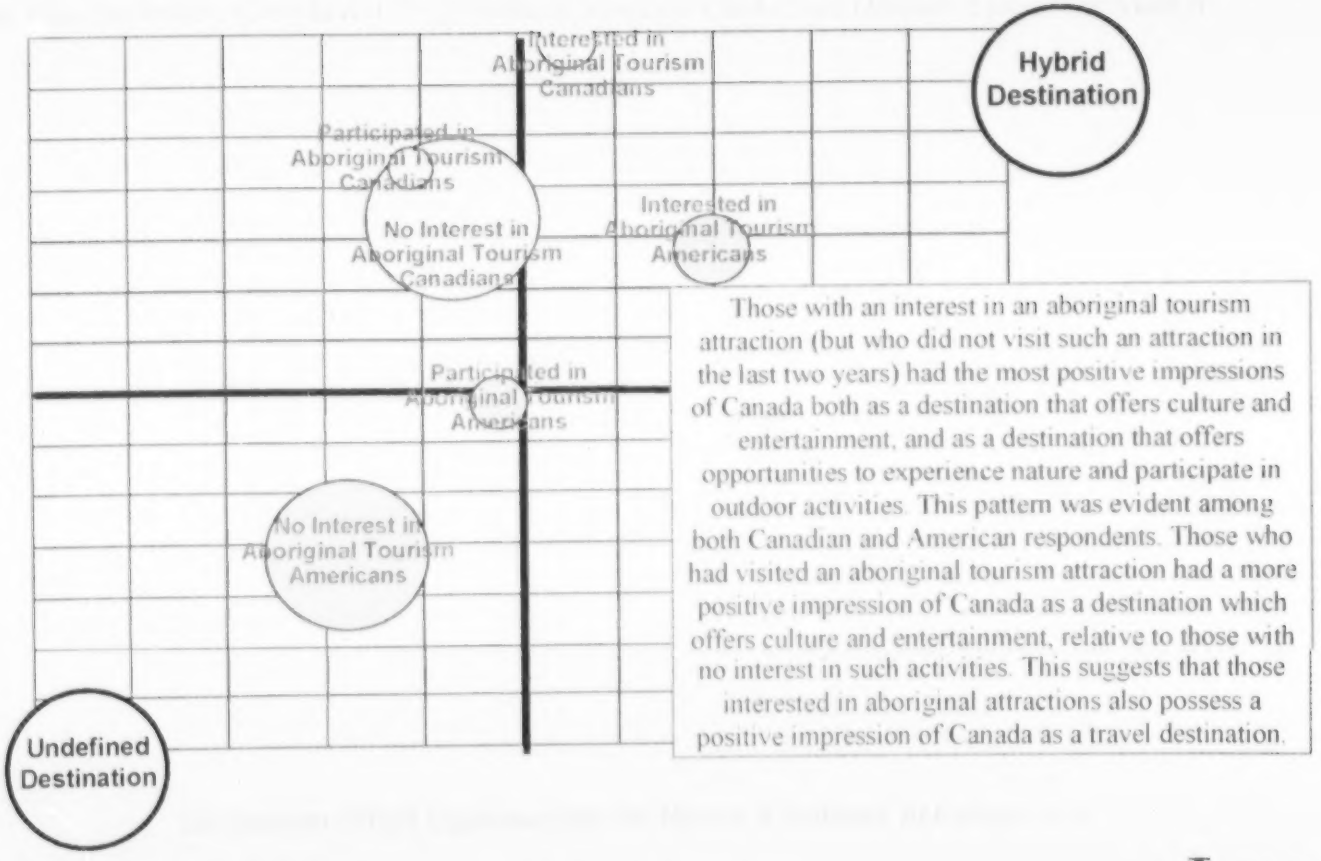
Canadian Vacation Imagery

By Interest in Aboriginal Tourism

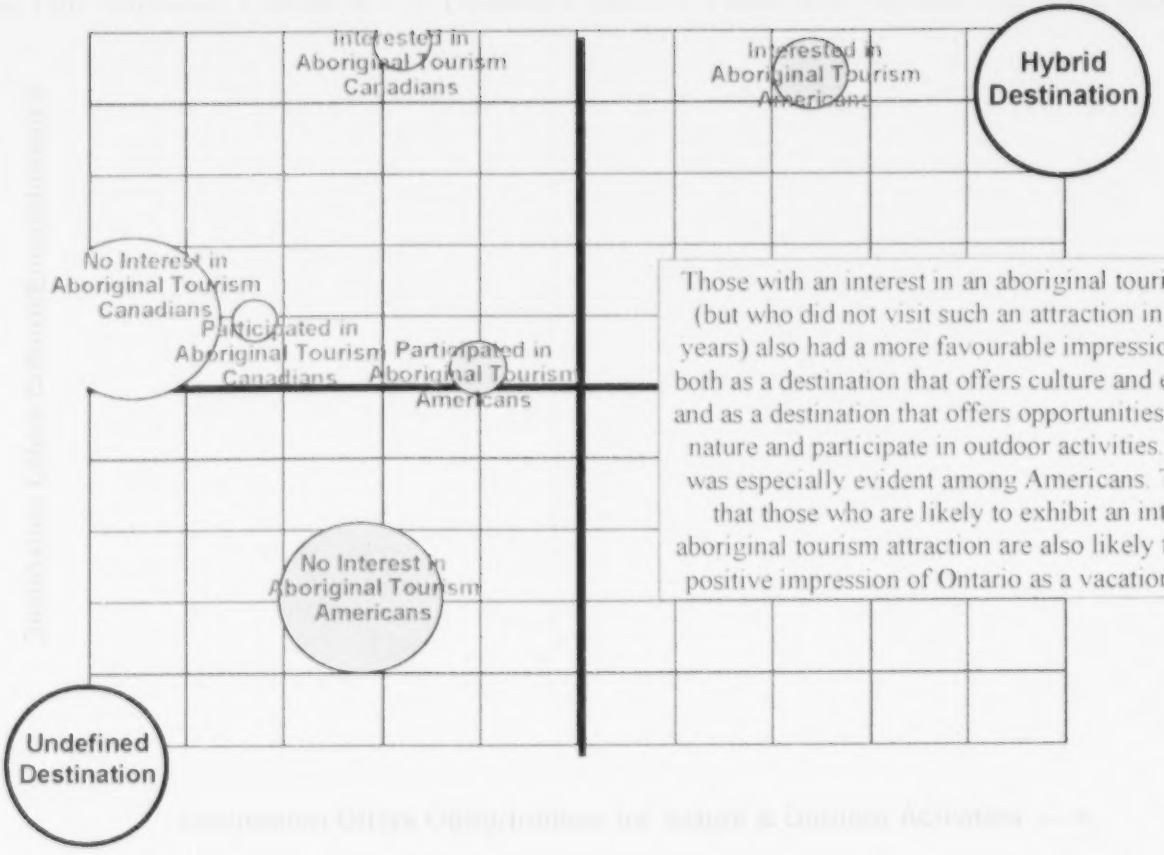
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Canada On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market


Interested in Aboriginal Tourism Canadians
Hybrid Destination
Participated in Aboriginal Tourism Canadians
No Interest in Aboriginal Tourism Canadians
Interested in Aboriginal Tourism Americans
Participated in Aboriginal Tourism Americans
No Interest in Aboriginal Tourism Americans
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities ---->

Those with an interest in an aboriginal tourism attraction (but who did not visit such an attraction in the last two years) had the most positive impressions of Canada both as a destination that offers culture and entertainment, and as a destination that offers opportunities to experience nature and participate in outdoor activities. This pattern was evident among both Canadian and American respondents. Those who had visited an aboriginal tourism attraction had a more positive impression of Canada as a destination which offers culture and entertainment, relative to those with no interest in such activities. This suggests that those interested in aboriginal attractions also possess a positive impression of Canada as a travel destination.


Interested in Aboriginal Tourism Canadians
Hybrid Destination
Participated in Aboriginal Tourism Canadians
No Interest in Aboriginal Tourism Canadians
Interested in Aboriginal Tourism Americans
Participated in Aboriginal Tourism Americans
No Interest in Aboriginal Tourism Americans
Undefined Destination

Those with an interest in an aboriginal tourism attraction (but who did not visit such an attraction in the last two years) had the most positive impressions of Canada both as a destination that offers culture and entertainment, and as a destination that offers opportunities to experience nature and participate in outdoor activities. This pattern was evident among both Canadian and American respondents. Those who had visited an aboriginal tourism attraction had a more positive impression of Canada as a destination which offers culture and entertainment, relative to those with no interest in such activities. This suggests that those interested in aboriginal attractions also possess a positive impression of Canada as a travel destination.


Interested in Aboriginal Tourism Canadians
Interested in Aboriginal Tourism Americans
Hybrid Destination
No Interest in Aboriginal Tourism Canadians
Participated in Aboriginal Tourism Canadians
Participated in Aboriginal Tourism Americans
No Interest in Aboriginal Tourism Americans
Undefined Destination

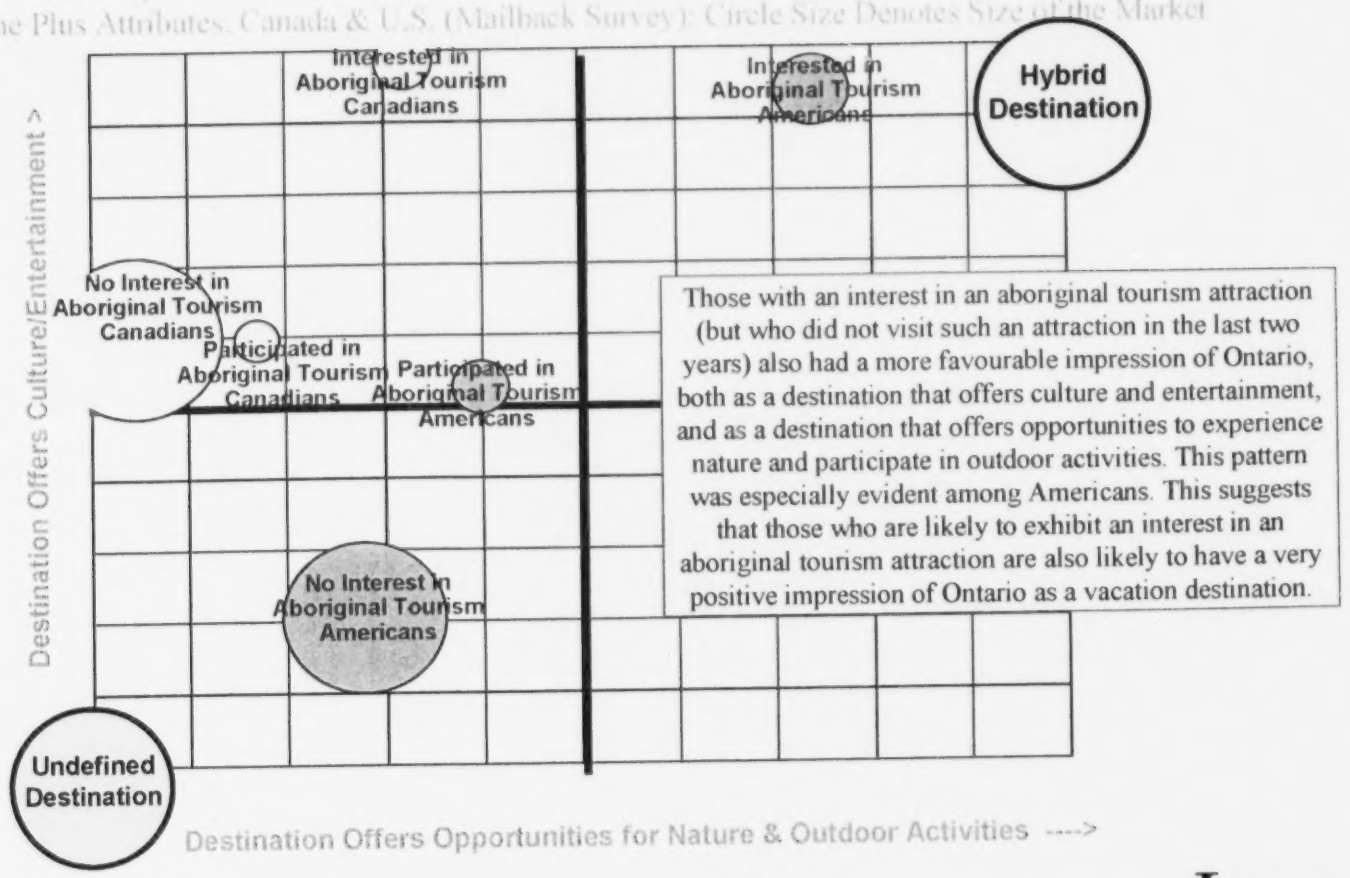
Those with an interest in an aboriginal tourism attraction (but who did not visit such an attraction in the last two years) also had a more favourable impression of Ontario, both as a destination that offers culture and entertainment, and as a destination that offers opportunities to experience nature and participate in outdoor activities. This pattern was especially evident among Americans. This suggests that those who are likely to exhibit an interest in an aboriginal tourism attraction are also likely to have a very positive impression of Ontario as a vacation destination.

Canada and United States

Ontario Vacation Imagery

By Interest in Aboriginal Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Ontario On One Plus Attributes, Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Market


Interested in Aboriginal Tourism Canadians
Interested in Aboriginal Tourism Americans
Hybrid Destination
No Interest in Aboriginal Tourism Canadians
Participated in Aboriginal Tourism Canadians
Participated in Aboriginal Tourism Americans
No Interest in Aboriginal Tourism Americans
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities --->

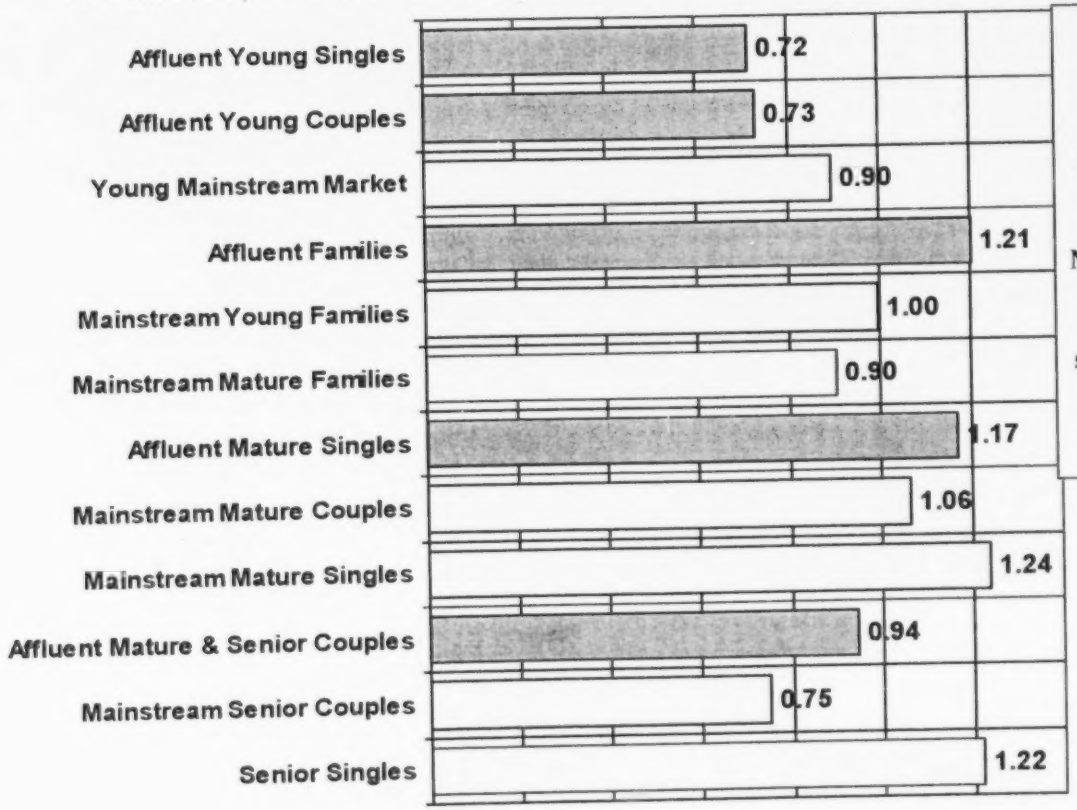
Those with an interest in an aboriginal tourism attraction (but who did not visit such an attraction in the last two years) also had a more favourable impression of Ontario, both as a destination that offers culture and entertainment, and as a destination that offers opportunities to experience nature and participate in outdoor activities. This pattern was especially evident among Americans. This suggests that those who are likely to exhibit an interest in an aboriginal tourism attraction are also likely to have a very positive impression of Ontario as a vacation destination.

Overall Market Potential

Interest in Aboriginal Tourism: Canada

Interest in Aboriginal Tourism By Likelihood of Travel Within Canada (Indexed)

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



The Overall Market Potential Index is constructed to identify those segments which are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote aboriginal tourism related vacation activities. This index indicates that in Canada the Mainstream Mature Singles, Senior Singles and Affluent Families are the most likely to be responsive to such initiatives. A secondary market for such initiatives is the Affluent Mature Singles. These four segments represent 23.1 % of the total adult (18 plus) population in Canada.

Technical Note

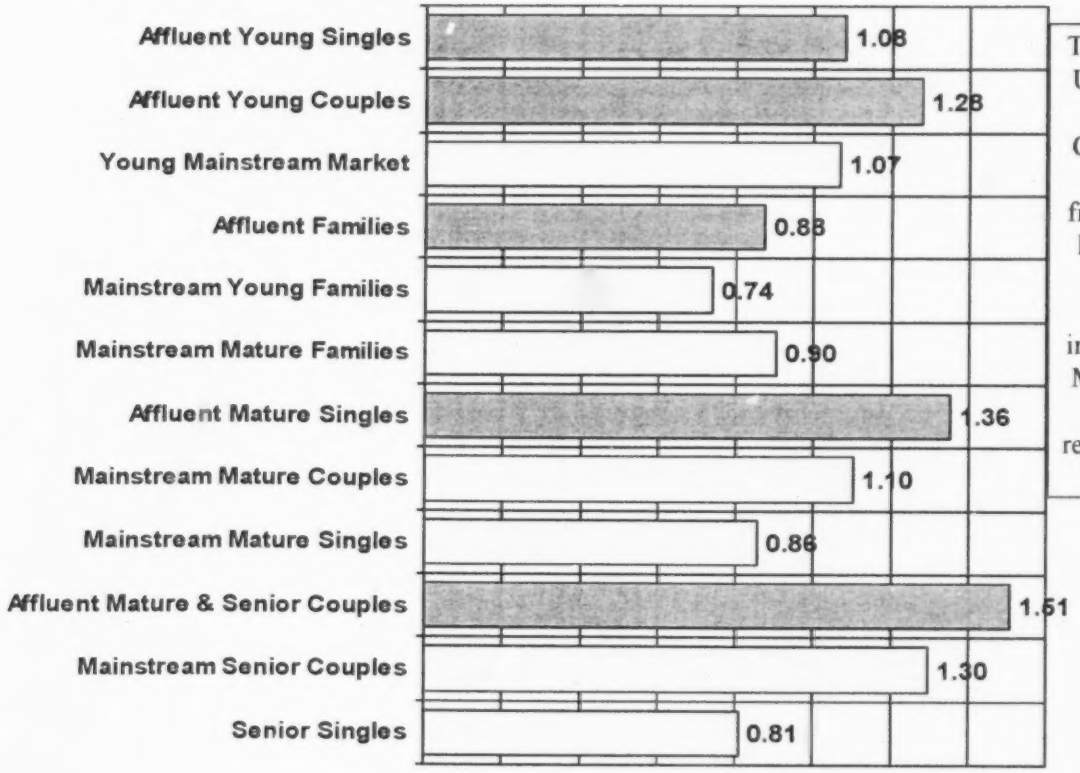
The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in aboriginal tourism related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Overall Market Potential

Interest in Aboriginal Tourism: United States

Interest in Aboriginal Tourism By Likelihood of Travel To Canada (Indexed)

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



The Overall Market Potential Index for the United States shows a somewhat different pattern compared to that observed for Canada. In the United States, the Affluent Mature and Senior Couples (who are frequent travellers to Canada) are the most likely to respond to initiatives promoting aboriginal tourism related vacation activities. Secondary markets for such initiatives are the Affluent Mature Singles, Mainstream Senior Couples, and Affluent Young Couples. These four segments represent 19.5 % of the total adult (18 plus) population in the United States.

Technical Note

The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in aboriginal tourism related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.